



Note: Returns will be delayed if copies of all required documents are not submitted to the tax preparer at a prompt time for appointment.

Tax Preparation for Personal Information

The IRS needs to know who is filing the tax return, as well as how many people are covered on it. To make this easy, they require:

- Last year's tax return if not the last two years
- Your Social Security number (copy of SS card)
- Your spouse's Social Security number (if married) (copy of SS card)
- Social Security numbers for any dependents (copy of SS cards)
- Your Driver's License number (copy of your driver's license)
- Your spouses Driver's License number (copy of driver's license)
- Birth Certificate(s) of dependents (copy of birth certificates)
- Head of Household please provide one of the following documents with your name on it – mortgage document, lease agreement, rental agreement, or property tax document.

Tax Preparation for Income Information

The following documents will help you prepare all the income information that you need to file a federal tax return:

- W-2 Forms from all employers you (and your spouse, if filing a joint return) worked for during the past tax year.
- 1099 Forms if you (or your spouse) completed contract work and earned more than \$600.

- Investment income information (including: interest income, dividend income, proceeds from the sale of bonds or stocks, and income from foreign investments).
- Income from local and state tax refunds from the prior year.
- Business income (accounting records for any business that you own)
- Unemployment income
- Rental property income
- Social Security benefits
- Miscellaneous income (including: jury duty, lottery and gambling winnings, Form 1099-MISC for prizes and awards, and Form 1099-MSA for distributions from medical savings accounts)
- 1098 T college age dependent under age 24

Tax Preparation for Income Adjustments

The following adjustments can help reduce how much you owe in taxes, and in turn, increase your chance of receiving a tax refund:

- Homebuyer tax credit
- Green energy credits
- IRA contributions
- Mortgage interest
- Student loan interest
- Medical Savings Account (MSA) contributions
- Self-employed health insurance
- Moving expenses

Tax Preparation for Credits and Deductions

There are many tax credits and tax deductions for various expenses, which are designed to help lower the amount of tax that an individual has to pay:

- Education costs
- Childcare costs
- Adoption costs
- Charitable contributions/donations

- Casualty and theft losses
- Qualified business expenses
- Medical expenses
- Job and moving expenses

Tax Preparation for Direct Deposit

Are you interested in having your tax refund directly deposited into your bank account? If so, you will need to provide two things:

- Your bank account number
- The bank's routing number

This tax forms/preparation checklist should help you get organized before filing your income tax return.