

## Items for Individual Tax Preparation

### General:

- Copy of last year's tax return (new clients only)**
- State issued photo ID**
- Social Security numbers for you, spouse and children**
- Voided check (for direct deposit of funds)**

### Income:

- W-2's for all jobs worked**
- 1099-G for income tax refund, or unemployment compensation**
- 1099-INT for interest income (may be on bank statement)**
- 1099-R for distribution from 401k distributions**
- SSA-1099 Social Security Income**
- Schedule K-1 from partnerships**
- W-2G if gambling income**

### Deductions:

- 1098 – Mortgage interest paid**
- Real Estate taxes paid (auto and home)**
- Copy of current property tax bill**
- Charitable contributions**
- Child care – need provider statement, tax id number, address and amount paid**
- Student loan interest statement**
- Tuition paid statement**
- Reservist/National Guard mileage if training overnight > 100 miles**

### Tax Credits/Payments:

- Estimated tax payments (dates and amounts)**
- Tax refunds or over payments applied from previous year**