

Please provide the following Tax documents needed to prepare your return

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|---|---|
| <input type="checkbox"/> W2 from your employer(s) | <input type="checkbox"/> 1099-INT from your bank(s) |
| <input type="checkbox"/> 1099-DIV from your financial institution(s) | <input type="checkbox"/> 1099-Comp from your financial institution(s) |
| <input type="checkbox"/> 1099R from your Pension or Retirement provider | <input type="checkbox"/> W2G from your gambling winnings |
| <input type="checkbox"/> Taxpayer's RRB-1099 from taxpayer's Railroad Retirement Board (RRB) | <input type="checkbox"/> Spouse's RRB-1099 from spouse's Railroad Retirement Board (RRB) |
| <input type="checkbox"/> Taxpayer's SSA-1099 from taxpayer's Social Security Administration | <input type="checkbox"/> Spouse's SSA-1099 from spouse's Social Security Administration |
| <input type="checkbox"/> 1099-Misc from Other Income sources | <input type="checkbox"/> 1099-Q from Qualified Education Programs |
| <input type="checkbox"/> 1099-B from Broker and Barter Exchange Transactions | <input type="checkbox"/> K-1 Partnerships from your Partnerships |
| <input type="checkbox"/> K-1 Scorp from your S-Corporation | <input type="checkbox"/> K-1 Trusts from your Trust or Estates |
| <input type="checkbox"/> 1098 Home Mortgage from your bank or lender | <input type="checkbox"/> 1099-G Unemployment Compensation from Government Payments |
| <input type="checkbox"/> Please provide a categorized list of income and expenses for your business(es) and/or access to your accounting software. | <input type="checkbox"/> Please provide a categorized list of income and expenses for your rental home if applicable. |
| <input type="checkbox"/> Please provide mortgage (or RV loan) interest statement from your bank or mortgage lender. | <input type="checkbox"/> Please upload health/medical savings distribution form, from your bank or financial institution. |
| <input type="checkbox"/> Prior Year Tax Return | <input type="checkbox"/> Picture of your (and your spouse if applicable) driver's license |
| <input type="checkbox"/> Please, upload a front and back view of your vehicle registration details. This should show me how much personal property tax you paid for your vehicle. | <input type="checkbox"/> For the Foreign Earned Income Exclusion, please provide a detailed travel log showing how long you were in each country and how much revenue you earned in each country. |
| <input type="checkbox"/> If you are concerned with state tax liability in states that you are not domiciled, please upload your travel log for the year. | |

Please provide the following information needed to prepare your tax return

Please, keep in mind that some of these questions may not apply to you, but I need to ask them just in case.

- What is your current mailing address?
- Did your marital status change before December 31st of the tax year?
- Were there any changes in dependents? If so, please provide their name, date of birth and social security number.
- Did you have any child or dependent care expenses? If so, please include care provider's name, address, ID number (SSN or EIN), and amount.
- What is your email address? What is your phone number? Please, provide the same for your spouse if applicable.
- Did you buy or sell stocks, mutual funds, bonds, or other investment properties? If so, please upload annual statements that reflect this activity.
- Did you buy, sell, or refinance your home? If so, please upload all the details you have regarding this.
- Did you donate clothes, cars, or stock? If so, please provide a detailed, Excel list of the items at Fair Market Value and include the address, date and estimated purchase value of those donations.
- Did you donate money during the year? If so please create a summarized excel list of the total cash donations to each organization. Please, don't just upload all of the receipts.

Please provide the following information needed to prepare your tax return

- Did you incur any tuition or continuing education expenses? This includes student loan interest. If so, please upload your statements that detail this.
- Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? If so, please provide your annual statement to this account.
- Did you and your dependents have health care coverage for the full-year?
- Did you receive any of the following IRS documents? Form 1095-A, 1095-B, or Form 1095-C? If so, please send.
- Do you own or have a controlling interest in foreign financial institutions, businesses or investment funds?
- If you dabble in cryptocurrency, were the value of your holdings over \$10,000 at any point in the year? If so, is your digital wallet or exchange located in another country?
- If you maintain a home office, please send over a list of all expenses incurred during the year for your home (HOA fees, utilities, rent/mortgage, landscaping etc.) as well as the total square footage of your home. Also, what is the square footage of the area specifically used as an office?
- Did you use a car for business purposes? Please, send over the make, year and model, total miles driven on the vehicle during the year VERSUS the total miles driven for business.
- Only if you are military! Did you spend money on moving to another location for another job? If so, please provide the total amount of moving expenses categorized by type (meals, lodging, storage, etc.). Also, provide the total amount of miles moved for this job.
- Did you make any estimated tax payments during the year? If so, please upload the amount and date paid for both Federal and State.
- Did you have substantial medical costs over the year? If so, it might be beneficial to add these as itemized deductions. Please, send me a summarized list of the total costs for doctor visits, hospital visits and prescriptions. Please, upload the lodging and mileage for these visits as well .
- For direct deposit, please provide your bank name, routing number, and account number.
- As you think about the upcoming year, do you see any changes to your finances? If so, please give me as many details as possible. I'm asking this to allow us both an opportunity to chat about any changes that may affect your tax situation. Please, keep in mind we may have to create a separate project for this IF your changes are substantial and require a thorough and detailed chat.
- Do you want to electronically file your tax return?
- Please list any questions or other concerns you might have.