What do I need to bring/upload for my individual taxes?
General Items Needed

(Please remember that any documents containing Social Security Numbers, bank accounts, dates of birth, or other confidential information should always be uploaded to your client portal or delivered in-person. Contact me if you need to set up your client portal account or reset your password.)

- ☐ Form 1095-A for anyone on your tax return who has insurance through the Affordable Care Act (healthcare.gov)
- ☐ W-2s from employers
- ☐ Mortgage Interest Statement
- ☐ Charitable donation receipts
- ☐ Statements showing retirement contribution or distributions
- ☐ List of education expenses paid during the year, including Form 1098-T from college
- ☐ Gambling winnings shown on W-2G and a list of gambling losses
- ☐ 1099-MISC/NEC for extra income received
- ☐ Name, Social Security Number, and date of birth for any new dependents
- ☐ Schedule K-1 from ownership in S Corporations, Partnerships, or Trusts (if I don't already have access)
- ☐ Statements of Interest Income, Dividend Income, and Stock Sales: Forms 1099-DIV, 1099-INT, 1099-B
- ☐ Amounts paid for student loan interest
- ☐ Amount of real estate taxes paid
- ☐ Amount of vehicle taxes paid
- ☐ Amounts spent on childcare, including childcare center name, address, and tax id number
- ☐ Schedule C business: List of income and expenses throughout year, including mileage
- ☐ Home Office information for business (if applicable): SF dedicated to home office, SF of house, cost of house insurance, annual cost of utilities
- ☐
- ☐ Medical expenses if over 7.5% of income
- ☐ Unemployment Forms 1099-G
- ☐ Two years of prior year tax returns for new clients