

What to Bring - Personal Tax Preparation

1. ID and Social Security Card for yourself, spouse (if applicable) and all dependents (for dependents - copy of birth certificate, social security card, school or medical records) - **We need this information every tax year per IRS requirements**
2. W2's
3. Record of Healthcare - Form 1095 A, B or C
4. Record of other Income (Form 1099's)
 - a. Interest and dividends from savings accounts, money markets, mutual funds, stocks, bonds, etc.
 - b. Non-employee compensation
5. Information about purchase and sale of stocks, bonds, and mutual funds
6. Total of Rental Property Income and Expenses
7. Copies of all K-1 forms, if any (Partnerships & S-Corporation)
8. Pension or IRA contribution & distribution
9. Itemized deductions such as
 - a. Medical Expenses
 - b. Real Estate Taxes
 - c. Interest on Residential Mortgage
 - d. Interest on Other Loans
 - e. Charitable Contributions
 - f. Casualty Losses
 - g. Tax Preparation Fee for Prior Year Tax Return (**if NEW CLIENT**)
 - h. Safe Deposit Box Fee
 - i. Any Unreimbursed Employee Business Expenses for Travel, Entertainment, Meals, Auto Expenses, etc.
10. Moving Expenses Reimbursement Documentation
11. Moving Reimbursement Documentation
12. Child Care Expenses
13. Federal & State Estimated Tax Payments
14. Purchase and Sale of Residence Documents such as:
 - a. Closing documents from Purchase and Sale of **Old Residence**
 - b. Closing documents from Purchase of **New Residence**
 - c. Copy of the Tax Return showing the Purchase of the **Old Residence**
15. Prior Years Federal and State Tax Returns (**if NEW client**)

**To save time and tax preparation fees, please summarize all receipts. If you have any questions, please email us tmcgillmbm@hotmail.com
Please sign and deliver with your tax documents to verify you have all documentation needed to complete your tax return.**

Signature _____ Date _____