

Are you employed? If yes you should have:

Form W-2

Are you Self-Employed without an Corp or LLC? If yes you should have:

Form 1099 (If you received one)

Profit and Loss Statement (Income and Expense itemized)

Mileage Statement (If claiming business miles)

[Get a Mileage Log Here](#)

Are you receiving Social Security and/or retired? If yes you should have

Form 1099 SSA - Social Security Statement

Form 1099-R - If you receive retirement funds/pensions/IRA

Form 5498 - If you have an IRA

Do You have any Investments? If yes you should have:

Form 1099 Compilation Statement (have funds with broker)

Form 1099-INT (If you receive interest)

Form 1099-DIV (If you receive dividends)

Form 1099-B (Stock transactions outside a brokerage)

Form K-1 (receiving funds from an LLC,LLP,Trust,S-Corp)

(If we prepare your business return we have this)

Do you have Rental Properties? If yes you should have:

Form 1099 Misc

Form 1098 Mortgage Interest Statement

Profit and Loss Statement

(If you have a property manager ask them if not click here)

HUD1 Statement (If you bought or sold a home)

Did you receive royalties? If yes you should have:

Form 1099 Misc

Did you receive a State Refund? If yes you should have:
Form 1099 G

Did you receive Alimony? If yes you should have:
The amount of alimony you received
Date of your Divorce

Did you receive Gambling winnings? If Yes you should have:
Form w-2g
Win/Loss statement from Casino

Did you receive a distribution from and HSA, MSA or Archer? If Yes:
Form 1099 SA

Did you receive Unemployment? If yes you should have:
Form 1099g (Please bring this form only)

Did you pay Alimony? If yes you should have:
The Amount Paid
Recipients Social Security Number
Date of Divorce

Did you contribute to an IRA, SEP or other qualified plan? If Yes:
Provide paperwork showing plan type, and contribution amount

Did you pay Student Loan Interest? if yes you should have:
Form 1098 E

Are you, your spouse, or your claimed dependents taking higher education?
Form 1098 T
List of expense paid not included on form 1098T

Did you file an Extension? If yes:
How much if any did you pay with extension? \$

Did you make quarterly estimated payment? If Yes:
Please provide payment amount and date paid

Do you own your primary home? If yes you should have:
(Only do if Itemizing)

Form 1098
Property Tax Paid

Do you have Health Insurance? If yes you should have:
Form 1095A (If you receive payment help with your premium)
Form 1095 B/C (If you have insurance through employment)

Do you have other Medical Expenses? If yes: (only do this if itemizing)
Please itemize your medical bills by (Doctor Visits, Hospital Visits, Dentist, Prescriptions, Eye Glasses, Hearing Aids, Medical Miles driven, and other medical expenses)

Did you purchase a vehicle? If Yes: (only do this if itemizing)
Pink Sales Slip

Did you pay Property Tax? If yes: (only do this if itemizing)
DMV receipt
Other property receipts

Did you make Charitable Contributions: If yes: (only do this if itemizing)
Receipts from organization
Itemization of items donated with purchase price and donation value
Letter from organization showing cash contribution amount
ledger of allowable cash donations (If you dont have above)