

Personal Income Taxes

I will need to following to prepare your Tax Return. Some items may not be applicable.

Full Name

Address

Social

Birthday

Phone Number

Email Address

Copy of Last Years Tax Return

Form(s) W-2: From Employer

Form(s) 1099: Dividends, Health Savings, Interest, Etc.

Form(s) 1098-T: Tuition Paid to school

Form(s) 1098: Mortgage Interest

Form(s) 1095: Healthcare Marketplace for Insurance

Property Tax Statements

Brokerage Statements for Stocks, Bonds, or other investment accounts

Closing Statements for Real Estate Transactions

Bank account info for your refund. Routing and Account numbers

Any other items pertinent to your taxes that you may have received