

What to SEND/Bring - Everyone



Ask Us about Selling or Buying Real Estate!

- All INCOME documents mailed to you “Important Tax Documents” (ALL W2s, W2Gs, 1099s, SSA, etc...)
- Driver’s license, social security cards, and date of birth for all persons to be listed on return
- Health Insurance - 1095-A, 1095-B or 1095-C
- Child Care (Provider name, address, FEIN or Social Security # and amount paid)
- If part year resident- dates you moved
- Copy of previous year’s tax return
- Tuition/education expenses (1098-T and out of pocket cost for books, fees, etc.)
- Educators - out of pocket supplies paid
- Tuition, books, fees for K-12 students
- Student loan interest •Retirement contributions (paid out of pocket)
- Alimony paid/received if established before 2019
- Moving expenses paid (active duty military only)
- Estimated taxes paid to IRS and state
- Home office deductions (see 'more info' link) to see if you qualify Click 'What to Bring' on website and category below that pertains to you
- Homeowner (See Homeowner Deductions Link) •Rental Property (Rental/Property Owners Link)
- Business or Self-Employed (See Businesses/Self Employed Link)
- Transportation/Logistic Owners/Truck Drivers (See Transportation Workers Link)