

DOCUMENTS FOR TAX PREPARATION

PHOTO ID FOR TAXPAYER AND SPOUSE
SOCIAL SECURITY CARD FOR ALL INDIVIDUALS ON TAX RETURN
(MUST BE ORIGINAL CARD, NO COPIES)

2018 TAX RETURN (HELPS US, BUT NOT REQUIRED)

BRING THESE DOCUMENTS AS THEY APPLY TO YOUR TAX RETURN:

W2'S (BRING FOR ALL EMPLOYERS FOR 2019)

SOCIAL SECURITY STATEMENT (FORM SSA 1099)

RETIREMENT INCOME FROM PENSIONS, ANNUITIES, AND
IRA DISTRIBUTIONS (FORM 1099-R)

INTEREST DOCUMENTS FROM CHECKING/SAVINGS
ACCOUNT (FORM 1099-INT)

DIVIDEND DOCUMENTS FOR BONDS, CD'S, BROKERAGE (FORM 1099-DIV)

BROKERAGE STATEMENT FOR SALE OF STOCK, BONDS (FORM 1099-B)

SELF EMPLOYMENT INCOME (FORM 1099-MISC)
DOCUMENTATION FOR EXPENSES (IF APPLICABLE)

UNEMPLOYMENT COMPENSATION (FORM 1099G)

DOCUMENTS FOR OTHER INCOME:
INCOME FROM RENTAL PROPERTY
GAMBLING WINNINGS/LOSSES
LOTTERY, PRIZES, AWARDS, JURY DUTY
SCH K-1

TUITION EXPENSES (FORM 1098-T)

STUDENT LOAN INTEREST (FORM 1098-E)

CHILD OR DEPENDENT CARE EXPENSES (LTR FORM CHILD CARE FACILITY)

MARKET PLACE INSURANCE (FORM 1095A)

ANY OTHER MISCELLANEOUS DOCUMENTS YOU WANT TO BRING