

 **Basic Information**

- Name, SSN or ITIN, Date of Birth
- Last Year's 1040 Tax Return
- Estimated Taxes Paid

 **Tax Documents Received**

- Form W-2s - Wage and Tax Statements
- Form 1095s - Health Ins Mktplace Statement 1095-A, Health Coverage 1095-B, and Employer Provided Health Insurance Offer & Coverage 1095-C
- Form 1098s - Includes Mortgage Interest 1098, and Student Loan Interest 1098-E
- Form 1099s - Includes Dividend Income 1099-DIV, Interest Income 1099-INT, Merchant Network Card Payments 1099-K, Miscellaneous Income 1099-MISC, Retirement Plan 1099-R, Sale of Home 1099-S, Capital Gains Txns 1099-B, HSAs, MSAs, or Medicare Advantage MSA 1099-SA, and Unemployment 1099-G
- Form 2439s - Notice to Shareholder of Undistributed Long Term Capital Gains
- Schedule K-1s - Partnership, S-Corporation, and Estate/Trust Income

 **Personal Tax Records**

- Child and Dependent Care Expenses
- Education Expenses
- Medical Expenses
- Vehicle DMV License Fees Paid
- Real Estate Taxes Paid
- Charitable Contributions
- Unreimbursed Employee Expenses
- Investment Transactions & Fees
- Retirement Contributions - IRA
- Foreign Earned Income
- Moving Expenses

 **E-File/Tax Return Option**

- Bank Account & Routing Number for Direct Deposit/Withdrawal