

Tax Preparation Appointments

Preparing for Your Appointment

Please review all the applicable information below to ensure you have all of your documents at the time of your scheduled appointment. If you are missing any documentation, your appointment may need to be rescheduled for a later date.

Along with reviewing the below and bringing all the applicable information/documents to your appointment, please complete the Tax Preparation Client Agreement on our website prior to your appointment.

Personal/Household Information

Please have the below information for each person in your tax household:

- Name
- Address
- Social Security Number
- Date of birth

Income and More

- Forms W-2 for wages, salaries and tips
- All Forms 1099 for interest, dividends, retirement, miscellaneous income, unemployment compensation, nonemployee compensation, Social Security, state or local refunds, gambling winnings, etc.
- Brokerage statements showing investment transactions for stocks, bonds, virtual currencies, etc.
- End of year profit and loss statement and balance sheet statement (if you have self-employment earnings)
- Schedule K-1 showing income from partnerships, S corporations, estates and trusts
- Detailed report of any rental income or expense and any closing statements for any new purchase(s) or sale(s) of rental(s)
- Statements supporting the receipt, exchange, sale, use or any other disposition of a digital asset

Expenses and More

- Statements and receipts supporting qualified educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q
- All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit
- All Forms 1099-QA and/or 5498-QA related to ABLE (Achieving a Better Life Experience) account
- All Forms 1099-H related to Health Coverage Tax Credit (HCTC) advance payments
- Statements supporting deductions for mortgage interest (Forms 1098), taxes and charitable contributions (including any Form 1098-C)

Real Property and Legal Matters

- Copies of closing statements regarding the sale or purchase of real property
- Legal papers for adoption, divorce, or separation involving custody of your dependent children

IRS/Tax Information

- Six-digit Identity Protection PIN if sent to you by the IRS
- Any tax notices sent to you by the IRS or other taxing authority
- A copy of your income tax return from last year, if not prepared by this office