

COMMON TAX DOCUMENTS NEEDED (PERSONAL)

1. INCOME

**Last Year's Return (for new clients only)*

W2's

1099-MISC

1099-NEC

1099-DIV

1099-R

1099-B

1099-C

1099-SA

Social Security Income

Gambling Winnings

2. EDUCATION

1098-T

1098-E

3. RETIREMENT CONTRIBUTIONS/DISTRIBUTIONS

IRA

ROTH IRA

SEP

4. HEALTH

1095-A

Medical/Dental Out-of-Pocket Expenses

5. DEDUCTIONS/CREDITS

1098-INT

Charitable Contributions

Real Estate Tax

Solar Panels

Child Care Expenses

Estimated Tax Payments

COMMON TAX DOCUMENTS NEEDED (BUSINESS)

1. **Last Year's Return (for new clients only)*

2. Profit & Loss Statement

3. Balance Sheet

4. **Depreciation Schedule (for new clients only)*