

WHAT TO BRING WITH YOU

Employment & Income (please bring in all income earned from entire household, including dependents)

- W-2 forms for the year
- Unemployment Compensation (1099-G)
- Miscellaneous Income including rent (1099-MISC)
- Retirement Income (1099-R)
- Social Security (1099-SSA)
- State & Local Income Tax Refunds (1099-G)
- Child Support Received
- State Assistance Received (FIA) (DHS)
- VA Benefits
- Amount of third stimulus payment (household total)
- Total of advance child tax credits July-December 2021

Homeowner & Renter

- Mortgage Interest (1098)
- Property Tax Statements** (Winter '20, Winter '21 and Summer '21) Bring all 3
- Rent Paid During Tax Year (Landlords name and address)
- Heating Cost of Home for the Year
- Sale of Your Home or Other Real Estate (1099-S)
- Second Mortgage/Line of Credit Interest Paid

Financial Assets

- Interest Income Statement (1099-INT)
- Dividend Income Statements (1099-DIV)
- Health Savings Account Statement – HSA (1099-SA)
- Proceeds from Broker Transactions (1099-B)
- Crypto Transactions

Expenses

- Gifts to Charity (must have receipts)
- Child Care Expenses (Bring Day Care's Tax ID number and address)
- Student Loan Interest Paid (1098-E)
- Plate/Vehicle Registration
- Medical

Self-Employed

- Business Income (Form 1099-MISC) and/or own records
- Business-Related Expenses: Own records Showing Totals of Each Category of Deduction (templates available on our website)
- Farm-Related Expenses: Own records Showing Totals of Each Category of Deduction (templates available on our website)
- Rental-Related Expenses: Own records Showing Totals of Each Category of Deduction (templates available on our website)
- Business Mileage
- Automobile Interest paid if for business
- Schedule K-1's

Health Care

- 1095-A: if you had MarketPlace insurance

Miscellaneous Tax Documents

- Estimates Paid for Current Year
- IRA Contributions
- Tuition paid at University or College for Self or Child (1098-T)
- Billing transcripts from the college for entire year