**ITEMS WE MAY NEED TO PREPARE YOUR TAX RETURNS**

**Please Note:** *For all documents, please provide a scan, photocopy, or fax. Do not send photos taken with a cell phone.*

**For Individuals**

* Identity Protection PIN (IP PIN): If you received a CP101A Notice from the IRS in January, your IP PIN is located in the left column. Please provide a copy of this letter.
* Names and SSNs for all persons listed on Tax Returns
* Prior year dependents no longer living with you.
* New dependents living with you.
* Any Changes to Addresses from prior year
* All W2s, 1099s and K1’s for all income (Wages, Interest, Unemployment, etc.)
* Information on any other income not reported on a W2 or 1099.
* Form 1095C from your employer or Health Care Provider
* 1099-Bs for sales of stock or securities. (all pages)
* Rollover or distribution amounts from Medical Savings Accounts, FSAs, HRAs, and Roth

IRA conversions

* Transactions in Cryptocurrency
* Form 1098 Mortgage Interest Statement – for homeowners
* HUD 1 Closing Statement – for homeowners - purchase or Re-fi during the year
* Property tax statements – if not paid through escrow account
* HUD 1 Closing Statement and state withholding forms on the sale of Property
* Notices, bills, etc., from the IRS or your state.
* For Earned Income Tax Credits:
  + Copy of the Child’s SS Card
  + Proof of the Child’s address (school record, doctor bills, medical ins. Forms, lease with child named as resident).
* For the Child and Dependent Care Expenses Credit:
  + Percentage of time the qualifying dependent lives in the home of the taxpayer;
  + Address, telephone number, and Social Security number or Employer Identification
  + Number of the care providers;
  + Expenses paid to providers; and
  + Nonresident military spouse’s military income.

**For Businesses**

* Income Statement, Balance Sheet and Trial Balance for each entity.
* 1099’s received from customers.
* 1099-Ks for merchant charges.
* 941s and State Equivalents for payroll expenses and payroll taxes paid
* 1099s sent to vendors
* Change of ownership of business entity during the year.
* Notices, bills, etc., from the IRS or your state.

***This is not intended to be an all inclusive list. We may ask for additional documents in the course of preparing your tax returns.***