

SUPPORTING DOCUMENT CHECKLIST

Below is a list of common documents needed to complete your tax returns.
Not all of these may apply.



Personal Information

- Last year's tax return (required).
- Social security numbers and birth dates for **ALL** Individuals listed on the return.
- Copy of driver's license, front and back (New York and New Jersey Residents only)

Income Information

- W-2** from all employers
- 1099-NEC**: Non-employee Compensation
Self employed & small business owners, please fill out the Business Intake Form.
 - Record of all expenses
 - Business assets
- 1099-MISC**: Prizes, awards, jury duty, etc.
- 1099-G**: Unemployment Compensation and or State Tax Refund
- 1099-R**: Retirement disbursements
- 1099-SA**: Social Security income
- 1099-INT**: Interest income statements
- 1099-DIV**: Dividend income statements
- 1099-B**: Sale of stock, mutual funds, or other securities
 - Must include purchase price
 - For multiple stock sales, a digital copy of the 1099-B may be required
- W-2G**: Gambling winnings (please provide total losses)
- 1099-S**: Sale of Real Estate (please provide purchase price)
- Alimony Received
- Rental Property Income
 - Record of income and expenses (please see page 3 of the Business Intake Form)
 - Rental asset information (cost, date placed in service, etc.) for depreciation purposes
- Schedule K-1**: Partnership, S-Corp, or Trust

Deductions, Adjustments & Credits

- 1098**: Mortgage Interest Statement
 - If real estate taxes are not paid through escrow, please provide total amount paid
- Real Estate Tax Paid (all properties)
- Estimated Income Tax Payments Federal & or State (provide dates)
- Alimony Paid (name, social security number & address of the recipient required)
- 1098-T**: Education Expenses from Qualified Institution
- 1098-INT**: Student Loan Interest Paid
- Childcare: Name of provider, address, social security number and amount paid
- ROTH/Traditional IRA Contributions, IRA, SEP, or Keogh amounts (plus amount of any personal contributions)
- Medical expenses (must exceed 10% of your adjusted gross income, 7.5% for age 65+)
- Work expenses not reimbursed by your employer
- Job search costs
- Charitable expenses