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What Do I Need For Taxes?

Personal Taxes

- ***Personal & Dependent Information***
  - ☐ Driver's License(s) & Social Security card(s)
  - ☐ Dependent's Social Security cards and birth certificates/birth dates
- ***Income***
  - ☐ Wage statements/W-2s
  - ☐ Self-employment business income and expenses and vehicle mileage/1099-MISC/ 1099-NEC, income/expense records
  - ☐ Pension, retirement income/1099-R
  - ☐ Unemployment income/1099-G
  - ☐ Social Security income/SSA-1099/RRB-1099
  - ☐ Commissions received/paid/1099's
  - ☐ Statements on the sale of stocks or bonds/1099-B or Bitcoin/Crypto Currency
  - ☐ Interest and dividend income/1099-INT/1099-DIV/1099-OID
  - ☐ Lottery or gambling winnings/losses/W2-g
  - ☐ State refund amount/1099-G
  - ☐ Alimony paid or received and ex-spouse info
  - ☐ Income and expenses from rental properties
  - ☐ Canceled Debt Amount/1099-C

- ***Deductions***
  - ☐ Form 1098 Mortgage or home equity loan interest
  - ☐ Real estate and personal property taxes
  - ☐ Child care expenses and provider information (Federal ID Number)
  - ☐ Medical and dental expenses (also miles)
  - ☐ Cash and non-cash charitable donations
  - ☐ Home purchase closing statement/HUD
  - ☐ Casualty or theft losses from Disaster
  - ☐ IRA contributions/Form 5498
  - ☐ State or local taxes paid
  - ☐ Estimated taxes or foreign taxes paid
  - ☐ Car purchase paperwork showing sales tax
  - ☐ Record of purchase or sale of your house
  - ☐ Educator expenses (Teachers)
  - ☐ Tuition and Education Fees/1098-T
  - ☐ Student loan interest/1098-E

- **Miscellaneous Items**
  - ☐ Last year's Federal and State tax return
  - ☐ 1095-A* If purchased health insurance through the Health Insurance Marketplace
  - ☐ Stimulus/EIP Payment Amounts
  - ☐ Advance Child Tax Credit Payment Amounts

Business/Corporate Taxes

- ***Quickbooks File Backup (If Applicable)***

- ***Income (Totaled)***
  - ☐ Gross receipts from sales or services
  - ☐ Refunds/Returns
  - ☐ Business checking/savings account interest (1099-INT or statement)
  - ☐ Other income
- ***Inventory (if applicable)***
  - ☐ Beginning inventory
  - ☐ Inventory purchases
  - ☐ Ending inventory
- ***Expenses (Totaled by Category)*** *Examples:*
  - ☐ Advertising
  - ☐ Automobile Expenses
    - Gas, Repairs, Etc.
    - Mileage Driven
  - ☐ Insurance
    - Automobile
    - Liability
    - Business
    - Errors & Omissions
    - Workers Comp
  - ☐ Travel expenses (Hotel, Airfare, Taxi, etc…)
  - ☐ Parking and tolls
  - ☐ Meals and Entertainment
  - ☐ Internet connection (hotel, Internet café etc.)
  - ☐ Legal Fees
  - ☐ Office Supplies
  - ☐ Rent Expense
  - ☐ Any Other Expenses, etc.
- ***Employee & Subcontractor payments***
  - ☐ 1099's-MISC and 1096
  - ☐ W3/W2's from Payroll Company
  - ☐ Federal and state payroll returns (Form 941's, 940, UCT6's, etc.)
- ***Assets & Equipment***
  - ☐ Cost and acquisition date of assets
  - ☐ Sales price and disposition date of any assets sold
- ***Interest expense***
  - ☐ Mortgage interest on building owned by business
  - ☐ Business loan interest
  - ☐ Auto Loan Interest
  - ☐ Business Equipment Loans
- **Miscellaneous Items**
  - ☐ Last year's Federal and State tax return