

Time to Get Organized

- Your last 3 years' tax returns (new client)
- Social Security numbers and dates of birth.
- W-2 forms
- Your last paycheck stub of the year
- 1099 Forms for interest, SS, retirement, and unemployment
- Property tax statements
- Forms 1098 for mortgage interest
- Year-end statements from investment accounts
- Assets held outside the USA
- Purchase and sale information, including dates, related to anything sold.
- Child care provider information (name, amount, and SS#)
- Names, addresses, and SS #'s from whom you received or paid interest
- Bankruptcy or divorce papers
- If you paid an individual person \$600 or more for services rendered in connection with your business, provide information.
- Records showing income and expense for any small business or rental property you own
- If you have an investment in a Partnership, S Corp, Estate, or Trust, need K-1 Form
- Bring all other statements of income
- Forms 1098-T amounts paid for post-secondary tuition sent to student and receipts
- Forms 1099-Q for distributions from education savings plans
- Records of estimated taxes paid
- Student loan interest forms 1098-E
- Adoption costs if applicable
- Form 1098-C for donations of auto or boats.
- Details on all noncash donations greater than \$500
- If you purchased a new fuel cell or plug-in vehicle, bring info.
- Solar-electric or solar water heating receipts
- Voided check for direct deposit
- Noncustodial parents claiming children need a signed IRS form 8332 to claim the child
- If your mortgage was forgiven due to foreclosure, bring form 1099-c or 1099-A
- If you bought a new home or refinanced, bring closing papers
- Info on energy saving home improvements
- 1099-K for internet or credit card sales
- Proof of health insurance.
- Health Savings Account contributions and distributions. 5498-SA and 1099-SA
- Out of pocket medical expenses may be deductible, bring details.
- Mileage log if applicable
- Minnesota education expenses (supplies, etc.)
- All charitable contribution records: Church, March of Dimes, Red Cross, Salvation Army, foodbanks, etc.
- Driver's license
- Alimony paid/received
- **Correct email address**