

## What should I provide for my personal tax return?

- Tax returns from the past 2 years if this is your first visit
- W2s
- 1099-R: Distributions from IRAs, Annuities, 401Ks
- 1099-INT, 1099 DIV: Interest and dividend income
- 1099-B: Stock sales with cost basis
- 1098: Mortgage interest statement
- 1095: Proof of Health Insurance Coverage
- Property taxes paid
- Contributions to charities
- Business income, expense, and milage (*See separate checklist for S-Corp or partnership*)
- Any additional income received (*SAA 1099 - Social Security Form, W2G - gambling winnings, rent*)
- Closing papers from home sale or purchase
- Closing papers from mortgage refinances
- Student loan interest paid
- Proof of college tuition paid (*1098-T and bank statement, receipts of amount paid, cancelled checks, etc.*)
- Proof of claimed dependents (*ex. report card doctor bill - must show name and address of dependent*)
- Charity or medical milage
- K-1s from corporations, investments, or partnerships