

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

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