



Name(s) _____ Check here if changed since last year

New address: _____

Best Phone Number to contact you: _____ Secondary Number: _____

Email Address: _____

Check here if you have any dependents not included on prior year return

Name	SS#	Date of Birth	Relationship to taxpayer

Income Documents

- W-2 Forms from all employers
- 1099 Forms for contract work over \$600.
- Investment income information 1099-INT, 1099-DIV, 1099-B
- Retirement (1099-R)
- Income from local and state tax refunds from the prior year.
- Business income (Schedule C income/Expenses or K-1)
- Unemployment income
- Rental property income (Schedule E or F Income/Expenses)
- Social Security benefits (1099-SSA)
- Health savings account distribution (1099-SA)
- Miscellaneous income (including: alimony received, jury duty, lottery and gambling winnings, Form 1099-MISC for prizes and awards, and Form 1099-MSA for distributions from medical savings accounts)

Adjustment Documents

- IRA contributions (might have 5498)
- Student loan interest-Form 1098-E
- Health/Medical Savings Account (HSA/MSA) contributions (Contributions through employer are on W-2)
- Self-employed health insurance amount
- Moving expenses
- Alimony Paid (including Name and SSN for person paid)

Deduction Documents

- Mortgage Interest (Form 1098)
- Real Estate Taxes (usually included on mortgage statement)
- Property taxes on Vehicles
- Charitable contributions/donations
- Work expenses not reimbursed (over 2% of your income)
- Medical expenses (over 7.5% of your income)

Other Info for Credits

- Education costs (Form 1098-T) plus costs of books/supplies
- Childcare costs (Name, Address, and SSN/EIN for care provider plus amount paid)

Health Insurance

- Market Place Form (1095-A)
- Other insurance (1095-B or 1095-C)

If you have a refund would you like it to be Direct Deposited? Yes No

Bank Routing Number: _____ Your bank account number: _____