



Tax Year: _____

GENERAL

PERSONAL INFORMATION

- Full name, SSN & DOB
- Spouse full name, SSN & DOB
- Copy of Last Year's Tax Return
- Dependents' name, SSN & DOB
- Driver's License/State ID
- Bank Account & Routing Number

BUSINESS INFORMATION

- Full Legal Name of Business
- EIN & State ID Number
- Copy of Last Year's Tax Return
- Owner's Name, SSN, Address & % of Ownership
- Type of Entity
- Type of Product/Service
- Income & Expenses
(P&L and Balance Sheet)

INCOME

- W2's from all employers
(also include W2-G - Gambling Income)
- 1099 Forms for other income
1099-INT, -DIV, -B for investment income
1099-G for Unemployment Income or State/Local Refunds
1099-MISC for Rents, Royalties, Prizes or other income
1099-NEC for Independent Contractor Work
1099-R distributions from IRAs or Retirement Plans
SSA-1099 for Social Security Benefits
1099-S for Sale of Property
- K1's from Businesses/Investment(s)

Notes:

DEDUCTIONS & CREDITS

ITEMIZED DEDUCTIONS

- Charitable Contributions
Cash/Check
Non-cash
Miles Driven and out of pocket expenses
- Medical Expenses
(Premiums, Co-pays, out-of-pocket expenses)
- Mortgage Interest
Form 1098
- Property Tax
- State and Local Income Tax
- DMV Registration(s)
- Tax Preparation Fees (for State Itemization)
- Job Related Expenses (for State Itemization)

OTHER DEDUCTIONS

- Student Loan Interest
Form 1098-E
- Traditional IRA Contribution

Credits

- Child Care Credit
Provider's Name, Address, Tax ID and amount paid
- Education Credit
Form 1098-T
- Energy-Efficient Home Improvements
- Qualified Plug-In Electric Vehicle
Year, Make and Model
Vehicle Identification Number

Other

- Health Care Forms
- Estimated Tax Payments
- Crypto Currency Investments

Notes:
