



1040 TAX PREP- WHAT TO BRING

❑ **Basic Info**

Name, SSN or ITIN, and date of birth

Last Year's Return - hard copy or PDF file (TaxAct can import basic info from PDF's of returns prepared by select software solutions)

❑ **Estimated Taxes Paid**

❑ **Documents Received**

Form W-2s - wage and tax statements

Form 1095s - includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)

Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)

Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)

Form 2439s - notice to shareholder of undistributed long-term capital gains

Schedule K-1s - partnership, S Corporation and estate or trust income

❑ **Personal Records**

Child and Dependent Care Expenses

Education Expenses

Medical Expenses

Vehicle (Personal Property) Taxes Paid

Real Estate Taxes

Mortgage Interest Paid

Charitable Contributions - Arizona State Tax Credits!!

Business or Employee Expenses

Gambling Expenses

Investment Transactions

Retirement Contributions

Foreign Earned Income and Foreign Taxes Paid

Moving Expenses

Last Year's Tax Return

Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)

Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)

Driver's license

Questions??

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