

Below is the information you will need to gather for the preparation of your personal tax returns. Having all your documents ready before your tax appointment enables things to run smoothly and more quickly.

Federal law requires all employers to send employees W-2 statements no matter how low earnings or wages are. These W-2 statements can be sent in either paper or digital form and must be received by employees no later than **January 31** of the following year.

Contractors, aka the self-employed, you should receive your 1099s by 1/31.

February 15 deadline: when brokers, including brokerage firms, mutual fund companies, banks, and barter exchanges, must furnish year-end Forms 1099-B to their customers.

Personal Information

- Your social security number
- Your spouse's full name and social security number
- Amount of any alimony paid and ex-spouse's social security number
- ITIN for those who qualify. It can take up to 7 weeks for processing (**longer during government shutdown**).

Other people who may belong on your return

- Dates of birth and social security numbers
- Childcare records (including the provider's ID number) if applicable
- Income of other adults in your home
- Form 8332, copies of your divorce decree, or other documents showing agreement between you and separated parent of claiming the child. (**contrary to popular belief, a child can be on the tax return of both parents. Please inquire before making an appointment**)

Employee Information

- Forms W-2

Self-Employment Information (a per hour rate will be charged for unorganized files and for creating books/statements)

- Forms 1099-MISC, Schedules K-1, 1099-K, income records (Bank Statements, Receipts) to verify amounts not reported on 1099s.

- Records of all expenses — Bank Statements, credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, “if applicable”

Vehicle Information (self Employed)

- Total miles driven for the year (or beginning/ending odometer readings)
- Total business miles driven for the year (other than commuting)
- Amount of parking and tolls paid
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Income (a per hour rate will be charged for unorganized files and for creating books/statements)

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)

Savings and Investments

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S) Dates of acquisition and records of your cost or other basis in property you sold

Other Income

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards

- Other 1099

Education Payments

- Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid
- Forms 1098-T and 1098-E, if you received them
- Scholarships and fellowships
- Student ID

IRA Information

- Amount contributed
- Traditional IRA basis
- Value of IRAs on Dec. 31st (Please provide year end statements)

Educator Expenses

- Credit Card Statements, Bank Statements, Receipts.

Itemizing Deductions

- Forms 1098 or other mortgage statements
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle sales tax paid
- HUD statement showing closing date of home purchase
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purpose
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)

If you were affected by a federally declared disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean-up costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- Check [FEMA](#) site to see if my county qualifies for individual assistance

TAX
Star
Mobile

