

ITEMS NEEDED FOR TAX PREPARATION OF PERSONAL TAX RETURN

1. Completed Tax Profile form
2. Copy of Previous year's tax return
3. Copy of driver's license(s) for both taxpayer and spouse.
4. Copies of birth certificates and social security cards for all dependent children (if applicable)
5. Copy of dependent care provider and total paid for the year (if applicable)
6. Total amount received from IRS for Child Tax Credit throughout the year (if applicable)
7. Form W2(s) for all jobs in tax year.
8. Form 1099(s) (if applicable) from banks, retirement/disability income, rental income, contract work, stock trades, etc.
9. Mortgage interest and property taxes (if applicable)
10. Identity Protection Pin # (if applicable)
11. Rental income and expenses for any rental properties (if applicable)
12. Brokerage statements for stock trades (if applicable)
13. Farm income/expenses
14. Business income/expenses
15. Total Estimated tax paid and dates when paid (if applicable)

Other: \_\_\_\_\_

Other: \_\_\_\_\_

Other: \_\_\_\_\_