



Document Checklist

Rupa Pereira

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<input type="checkbox"/>	Names and birth dates for you, spouse, children/dependents on the Tax Return
<input type="checkbox"/>	Copy of Social Security Card for you , spouse, children/dependents on the Tax Return
<input type="checkbox"/>	Copy of Front and Back of Driver's license for you and spouse
<input type="checkbox"/>	Copy of birth certificate(s) for your children/ dependents

Bank Information (for new clients)

<input type="checkbox"/>	Bank account number and routing number for direct deposit/refund of tax
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Prior Tax Return (for new clients)

<input type="checkbox"/>	Copy of Last Year's Tax Return
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TAX DOCUMENTATION TO PROVIDE

Estimated Taxes Paid

<input type="checkbox"/>	Record of all Estimated Tax Payments made
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Sources of Income

Employment

<input type="checkbox"/>	W-2 for wages, tips and bonuses
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Self-Employment

<input type="checkbox"/>	1099 for pay from client(s)
<input type="checkbox"/>	Any other record of income not already shown on 1099 or K-1s
<input type="checkbox"/>	Record of all self-employment expenses
<input type="checkbox"/>	Miles driven for self-employment purposes
<input type="checkbox"/>	Business-use asset information (cost, date placed in service, etc) for depreciation
<input type="checkbox"/>	Home office information if applicable – square footage, prorated home expenses, etc
<input type="checkbox"/>	Record of Estimated tax payments made

Unemployment

<input type="checkbox"/>	1099-G for unemployment and/or family benefits
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Retirement Income

<input type="checkbox"/>	SSA-1099 for Social Security Benefits
<input type="checkbox"/>	1099-R for income from pensions, IRAs, annuities etc

Savings & Investments



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<input type="checkbox"/>	1099- INT for interest
<input type="checkbox"/>	1099-DIV for dividends
<input type="checkbox"/>	1099-B for consolidated brokerage statement
<input type="checkbox"/>	Record of transaction dates/costs in securities where basis was not reported
<input type="checkbox"/>	1099-S for real estate sales
<input type="checkbox"/>	1099-SA for Health Savings Account reimbursements
<input type="checkbox"/>	1099-LTC for Long Term Care insurance benefits
<input type="checkbox"/>	1099-Q for distributions from qualified education plans
<input type="checkbox"/>	K-1 for income from partnerships or S-corp
<input type="checkbox"/>	Record of estimated tax payments due

Rental Properties

<input type="checkbox"/>	Record of all income and expenses
<input type="checkbox"/>	Rental Asset information (cost, date placed in service, etc) for depreciation
<input type="checkbox"/>	Closing statement from any investment property purchase or sale
<input type="checkbox"/>	Record of estimated tax payments made

Other income and losses

<input type="checkbox"/>	1099-G for state tax refund
<input type="checkbox"/>	W-2G for reported gambling winnings and record of gambling winnings not reported on W-2G
<input type="checkbox"/>	K-1 for income from trust
<input type="checkbox"/>	1099-MISC for royalty income
<input type="checkbox"/>	1099-C for cancellation of debt
<input type="checkbox"/>	Record of jury duty expense
<input type="checkbox"/>	Record of hobby income or prizes and awards
<input type="checkbox"/>	Record of alimony paid/received and date of divorce decree
<input type="checkbox"/>	All other 1099s

DEDUCTIONS

Home Ownership

<input type="checkbox"/>	1098 for mortgage interest
<input type="checkbox"/>	Record of any interest not reported on 1098
<input type="checkbox"/>	Record of real estate taxes paid
<input type="checkbox"/>	Record of energy saving home improvements

Charitable Donations

<input type="checkbox"/>	Record of cash amounts donated
<input type="checkbox"/>	Record of non-cash contributions
<input type="checkbox"/>	Miles driven for charitable purposes



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Medical expenses

<input type="checkbox"/>	Record of amounts paid for health insurance, copays, co-insurance and prescription drugs
<input type="checkbox"/>	Miles driven for medical purposes

Health Insurance

<input type="checkbox"/>	1095-A if you're enrolled in a Marketplace based plan
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Childcare Expenses

<input type="checkbox"/>	Record of feeds paid to child care providers. Provider's EIN or SSN required
<input type="checkbox"/>	Record of wages paid to baby sitter

Educational Expenses

<input type="checkbox"/>	1098-T for payments to educational institutions
<input type="checkbox"/>	1098-E for student loan interest
<input type="checkbox"/>	Record of contributions to qualified education savings plan such as 529
<input type="checkbox"/>	Record of scholarships or fellowships

K-12 Educator Expenses

<input type="checkbox"/>	Record of unreimbursed classroom expenses
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State & Local Taxes

<input type="checkbox"/>	Record of state/local income tax paid
<input type="checkbox"/>	Record of vehicle sales taxes paid

Retirement & Other Savings

<input type="checkbox"/>	5498s for IRA /HSA contributions
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Federally Declared Disaster

<input type="checkbox"/>	City where you lived /worked/ or had property
<input type="checkbox"/>	Record of property loss costs such as appraisals, clean-up costs, etc
<input type="checkbox"/>	Record of rebuilding /repair costs
<input type="checkbox"/>	Record of insurance claims paid or payable