



Personal Information

- Social Security Number (*everyone*)
- Driver License (*adults only*)
- Copy of last year's return
- DOB (*everyone*)
- Bank Account Information

Income/ Investments

- W-2, 1098, 1099 Forms
- IRA/ 401K Contributions
- Stock Investments
- Loan Statements
- Other Incomes or Benefits

Home / Rental Property

- Mortgage Energy Efficient Receipts
- Paid Real Estate Taxes
- Insurance Premiums
- Rental Income/ Taxes Paid
- Receipts for Repairs, Inspections, etc.
- Mileage for Repairs, Inspections, etc.
- Closing Documents (*if you purchased or sold during the year*)
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Own A Business

- Tax ID
- Income/ Expenses
- Capital Assets/ Equipment
- Mileage Log
- Health Insurance Premium
- Business use of home (*if applicable*)

Health Care

- Form 1095-B or 1095-C
- HSA Information
- Health Insurance Premium
- Medical/ Dental/ Vision Expenses
- Medical Equipment

Other Deductions

- Child Tax Credit
- Childcare Expenses
- Charitable Donations
- Retirement plan contributions
- Educational Expenses
- Moving Expenses
- Sales tax from vehicle purchase
- Mileage for Repairs, Inspections, etc.
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