

**What to bring - Tax Season 2020**

**What you need to bring for personal returns:**

* **Photo ID’s and social security cards for taxpayer, spouse, and dependents**
* Birthdates for all being reported on the tax return
* W2’s (last pay stub does not qualify as a W2)
* 1099R – Pension/ Annuity/ IRA Statements
* 1098 - Mortgage Statements
* Donations, Medical Expenses, Gambling Statements (Winnings & Losses)
* Real Estate Taxes Paid
* 1099INT/DIV- Interest Earned and/or Dividends
* 1099B Stocks bought & sold (cost basis needed)
* Child Care Expenses including name, address and SS# or EIN# for provider
* Education Expenses including 1098-T from college, tuition and book invoices
  + Detailed bills from the college showing tuition paid
* **1095-A, 1095-B, or 1095C – ACA Health Insurance Reporting**
* Voided check for clients wishing to use Direct Deposit for their refunds.
* Any mailings marked with **IMPORTANT TAX DOCUMENTS**
* Closing statement MUST be provided for all real estate transactions including purchases and sales of property.

**What you need to bring for business returns:**

* All income statements
* Profit and loss statements
* Business Expenses
* Vehicle expenses and mileage
* Major Asset purchases including date purchased and cost
* Voided check for clients wishing to use Direct Deposit for their refunds.
* Depreciation report (if we did not prepare your 2017 return)

**What you need to bring for rental income returns:**

* All monies received from rental properties divided by properties
* Mortgage interest statements for properties
* Real Estate taxes for properties
* Expenses for properties for each property
* Major Asset purchases or major repairs/maintenance/improvements
* Deprecation report (if we did not prepare your 2017 return)

**Note: If we did not prepare your 2018 tax return, please bring a copy with you to your appointment.**