

Clients need to provide the following for taxes to be filed

1. Completed Client data sheet – **answer the crypto question**
2. FBAR details or FBAR Certificate (if applicable)
3. Signed Engagement Letter
4. Copy of prior year tax returns (for new Clients only)
5. VALID ID - Driver's License, State ID or Passport

Income Documents

- a. W-2 (all Pages)
- b. 1099 (all Types)
- c. Business Income & Expense details (P&L's)
- d. 1099-B Brokerage (Capital gain)
- e. Rental income
- f. 1099-G Unemployment Compensation
- g. 1099-SSA Social security Benefits
- h. All other income with backup documents

Deduction documents

HSA contributions – 1099-SSA & 5498-SA – Amount contributed by the employer

IRA Contribution – 5498

Student loan interest – 1098-E

Other documents that may apply

- 1098 Mortgage statement
- Real Estate tax bill(s)
- Donations with receipts
- Childcare expenses with receipts - **elaborated**
- 1098-T Education Expense 1098-T
- Mileage log (if claiming mileage) May be downloaded as an APP
- BUH (business use of home)

For ITIN

Photo, Visa (with date of entry stamp) and address pages for everyone who need an ITIN

1797A - if the Visa or passport has expired

For CA, IN, MA, MD, ME, NJ, WI Residents

Details of rent paid with address and dates lived (AGI limitations may apply)

CA residents: Provide vehicle license fee amount

WI residents: Rent certificate/Property tax bill

IF THERE IS A CHANGE OF ADDRESS I NEED TO BE NOTIFIED IMMEDIATELY OR THERE WILL BE A REWORK CHARGE.

HSA Account:

1099-SA

5498-SA

Year-End Statement

XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Situation

Documents required

If you work as an employee

W2

Interest Income

1099-Int

Dividend Income

1099-Div

Contract/Misc Income

1099-NEC or 1099-Misc – [see below for additional details](#)

Sch C filers

Business Income/expenses

Business Use of Home Expenses - [see below for additional details](#)

Mileage

Bank Statement

Business Use of Home Expenses:

Total Area of the home :

Area used **EXCLUSIVELY** for Business :

All expenses on annual basis

For Renters:

Rent :

Renters Insurance :

For Home Owners:

Mortgage Interest:

Property tax :

Home Insurance :

For all:

Utility expenses :

Repairs & Maintenance :

- Other Expenses : Must be provided on a spreadsheet under 3 columns: Date, Description, Amount
- Mileage Log : Must be provided on a spreadsheet under 3 columns: Date, Travel details, Miles travelled. In addition, provide the total miles travelled in the year.