



INDIVIDUAL TAX RETURN DOCUMENT SUGGESTIONS

New Clients:

- Prior year tax return
- Driver's license copy
- Tax preparation fees

Income Records

- Employee income: W-2,
- Contractor income: 1099s,
- Investment income: 1099-Int, 1099-Div,
- Retirement accounts: 1099-R, 5
- Social Security: 1099-SA,
- Sole Proprietorship: Profit & Loss for Schedule C
- Partnership income: 1065 K-1
- S-Corporate income: 1020S K-1
- Hobby income: sometimes reported on 1099-K

Receipts for:

- Estimated tax
- Child care & adoption expenses
- Employee business expenses for CA
 - Job seeking expenses
 - Union dues
 - Safe deposit box
 - Legal fees
- Medical and Dental expenses
- Medical mileage record
- Self-employed health care premiums
- State and local income taxes paid
- Sales tax paid on large purchases
- Charitable contributions
- Gambling losses

Additional Tax Statements

- Form 1095-A: Health Care Statement
- Form 5498: IRA contribution
- Form 5498-SA: HSA contributions
- Form 1098-E: Student Loan Interest paid
- Form 1098-Int: Mortgage interest paid