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What Do I Need For Taxes?

Personal Taxes

- **Personal & Dependent Information**
 - ☐ Last Year's Federal and State Tax Returns
 - ☐ Driver's License(s) & Social Security card(s)
 - ☐ Dependent's Social Security cards and birth certificates/birth dates
 - ☐ 1095-A* If purchased health insurance through the Health Insurance Marketplace
- **Income**
 - ☐ Wage statements/W-2s
 - ☐ Self-employment business income and expenses and vehicle mileage/1099-MISC/1099-NEC, income/expense records
 - ☐ Pension, retirement income/1099-R
 - ☐ Unemployment income/1099-G
 - ☐ Social Security income/SSA-1099/RRB-1099
 - ☐ Commissions received/paid/1099's
 - ☐ Statements on the sale of stocks or bonds/1099-B or Bitcoin/Crypto Currency
 - ☐ Interest and dividend income/1099-INT/1099-DIV/1099-OID
 - ☐ Lottery or gambling winnings/losses/W2-g
 - ☐ State refund amount/1099-G
 - ☐ Alimony paid or received and ex-spouse info
 - ☐ Income and expenses from rental properties
 - ☐ Canceled Debt Amount/1099-C
- **Deductions**
 - ☐ Form 1098 Mortgage or home equity loan interest
 - ☐ Real estate and personal property taxes
 - ☐ Child care expenses and provider information (Federal ID Number)
 - ☐ Medical and dental expenses (also miles)
 - ☐ Cash and non-cash charitable donations
 - ☐ Home purchase closing statement/HUD
 - ☐ Casualty or theft losses from Disaster
 - ☐ IRA contributions/Form 5498
 - ☐ State or local taxes paid
 - ☐ Estimated taxes or foreign taxes paid
 - ☐ Car purchase paperwork showing sales tax
 - ☐ Record of purchase or sale of your house
 - ☐ Educator expenses (Teachers)
 - ☐ Tuition and Education Fees/1098-T
 - ☐ Student loan interest/1098-E
- **Miscellaneous Items**
 - ☐ Stimulus/EIP Payment Amounts
 - ☐ Advance Child Tax Credit Payment Amounts

Business/Corporate Taxes

- **Quickbooks File Backup (If Applicable)**
- **Income (Totaled)**
 - ☐ Gross receipts from sales or services
 - ☐ Refunds/Returns
 - ☐ Business checking/savings account interest (1099-INT or statement)
 - ☐ Other income
- **Inventory (if applicable)**
 - ☐ Beginning inventory
 - ☐ Inventory purchases
 - ☐ Ending inventory
- **Expenses (Totaled by Category) Examples:**
 - ☐ Advertising
 - ☐ Automobile Expenses
 - Gas, Repairs, Etc.
 - Mileage Driven
 - ☐ Insurance
 - Automobile
 - Liability
 - Business
 - Errors & Omissions
 - Workers Comp
 - ☐ Travel expenses (Hotel, Airfare, Taxi, etc...)
 - ☐ Parking and tolls
 - ☐ Meals and Entertainment
 - ☐ Internet connection (hotel, Internet café etc.)
 - ☐ Legal Fees
 - ☐ Office Supplies
 - ☐ Rent Expense
 - ☐ Any Other Expenses, etc.
- **Employee & Subcontractor payments**
 - ☐ 1099's-MISC and 1096
 - ☐ W3/W2's from Payroll Company
 - ☐ Federal and state payroll returns (Form 941's, 940, UCT6's, etc.)
- **Assets & Equipment**
 - ☐ Cost and acquisition date of assets
 - ☐ Sales price and disposition date of any assets sold
- **Interest expense**
 - ☐ Mortgage interest on building owned by business
 - ☐ Business loan interest
 - ☐ Auto Loan Interest
 - ☐ Business Equipment Loans
- **Miscellaneous Items**
 - ☐ Last year's Federal and State tax return