

- FOR YOU, YOUR SPOUSE, AND YOUR DEPENDENTS**
Full legal name(s), Date(s) of Birth, Social Security Number(s) and cards, Form of ID Verification:
(Driver's license(s), Passport)
- TAX RETURN FROM PREVIOUS YEAR (IF AVAILABLE, PREVIOUS 3 YEARS)**
- PERSONAL INCOME STATEMENTS**
W-2 (for you and your spouse) and 1099-NEC for each job (Independent contractors or Self-employed)
- UNEMPLOYMENT INCOME OR STATE OR LOCAL REFUNDS**
Form 1099-G
- INVESTMENT OR INTEREST INCOME**
1099-INT, 1099-DIV, 1099-B, and Schedule K-1
- OTHER INCOME**
Jury duty payments, prizes/awards, gambling winnings/losses (W-2G), income from hobbies, canceled debts (1099-C), nonbusiness rental income, any documents received for tax purposes
- VIRTUAL CURRENCY** (Crypto sales/disposition - Profits and Losses, Transaction Forms)
- HOME OR PROPERTY SALE**
Form 1099-S
- PENSION/IRA/ANNUITY**
Form 1099-R, Form 5498
- SOCIAL SECURITY/RRB INCOME**
SSA-1099, RRB-1099
- TRUST AND ESTATE BENEFICIARY EARNINGS**
Form 1041, Schedule K-1
- HEALTH SAVINGS ACCOUNT AND LONG-TERM CARE REIMBURSEMENTS**
Forms 5498-SA (Contribution tax document) and 1099-SA (Distribution tax document)
- EDUCATION EXPENSES**
Tuition statements, receipts for qualified educational expenses (1098-T), student loan interest statements (1098-E), 529 plan or Coverdell (1099-Q)
- HOMEOWNER EXPENSES**
Mortgage interest statements (Form 1098), property tax payment receipts, and energy efficient upgrade receipts (Form 5695 if provided by installer)
- CHARITABLE CONTRIBUTIONS**
Church contributions, receipts for monetary and non-monetary contributions and donations, vehicle donations (1098-C or a letter confirming donation)
- CHILD AND DEPENDENT CARE EXPENSES**
Name, address, and Tax ID or Social Security Number of the provider
- HEALTH CARE EXPENSES**
Record of payments made during the current tax year for medical, dental, eye, premiums, prescriptions, supplements, medical items, mileage
- SELF-EMPLOYMENT (IF APPLICABLE)**
Advertising/marketing, business mileage or vehicle repair expenses, commissions and fees, contract labor payments, record of assets for depreciation, interest payments related to business, taxes and licenses, rents/leases, repairs and maintenance, utilities (phone, internet, electricity, business cable), home office expenses and square footage, office supplies, pension plan contribution, health insurance payments, business insurance other than health, business travel and meals, banking fees, bad debts, estimated tax payment receipts (state and federal), EIDL and/or PPP documentation
- CORPORATION TAX RETURN(S) (1120S, 1120, 990)**
Previous year tax return, formation documents, all income and expenses, financial reports
- TAX RESOLUTION - IRS DEBT** All letters, statements