



This list is a general guide of the most common individual tax documents. It is not meant to be a comprehensive list. If you have additional documents you believe should be used to prepare your tax return, please bring them to your tax appointment.

General Info/Documents:

- SSNs for everyone on return
- DoBs for everyone on return
- IDs for the adults
- State(s) of residency
- Prior year tax return (for new clients)
- Dates and amounts of estimated quarterly tax payments made

Income Documents:

- W-2(s) (I only need one copy of each)
- 1099-misc
- 1099-R (pensions and IRA distributions)
- 1099-G (state tax refunds and/or unemployment compensation)
- 1099-SSA (Social Security income)

These next 3 will often be on a 'consolidated statement' (but not always!)

- 1099-INT (interest)
- 1099-DIV (dividends)
- 1099-B (proceeds from broker or barter transactions)

- Schedules K-1 (This tells you the income (or loss) you received from partnerships, S corporations, and trusts)
- Any other income reporting statements

Documents for Adjustments (which are a lot like deductions, but not quite the same):

- Form 1098E Student loan interest
- Contributions to your IRA(s)
- Moving expenses incurred to take a job more than 50 miles from your previous home
- Travel expenses for military reservists
- Alimony payments (Need SSN of your Ex)
- Health Savings Account documents
- Contributions to 529 or Coverdell education accounts (state returns)
- Contributions to 529 ABLE accounts (state returns)

Documents for Deductions:

- Form 1098 Mortgage Interest Statement (this should show):
 - the interest you paid,
 - the points you paid,
 - your real estate taxes paid,
 - and the address of the property securing the loan

- Personal Property Tax Bills (in Virginia Beach they are blue/white and show how much tax the city collected on your vehicle, boat, trailer, etc.
- Military LES (it may not be needed, but it can be helpful)

- Medical Expenses (this has to add up to more than 7.5% of your adjusted gross income before it counts, so don't bother with 1 or 2 receipts. This deduction is only practical for BIG medical expenses.)
 - Medical Bills You Paid
 - Health Insurance Premiums you paid
 - Mileage to/from your medical appointments
 - Additional expenses incurred (i.e. you had to stay in a hotel when you took your child to a specialist in another city.)
 - Nursing facility costs

- Charitable contributions
 - Receipts for cash donations
 - Receipts for non-cash donations (make sure there is a dollar value on the receipt!)

Documents for the Child and Dependent Care Credit:

This credit is usually for the daycare of children 13 and younger. However, it can also be claimed if your dependent requires care due to a disability.

- Name, address and Tax ID number of the provider (if the provider is an individual, then the Tax ID number is the Social Security Number.)

Documents for Education Credits:

- Form 1098-T (this shows the amount paid for tuition)
- Form 1099-Q (showing a distribution from your 529 or Coverdell plan)
- Receipts for books and other required supplies
- Room & Board (if a 529 plan was used)