

## **Documents to Provide for Tax Preparation**

Please provide the following applicable items for tax preparation by e-mail, fax (858-225-7722), or by uploading them using the client login.

Incon	ne	
	Employee wages	Form W-2
	Interest and dividends	Form 1099-INT and Form 1099-DIV
	Brokerage transactions for stocks and bonds	Form 1099-B
	Self-employment income, rents, royalties, or other income	Form 1099-MISC
	Income or loss from a partnership, S corporation, or trust	Schedule K-1
	State tax refund from the prior year	Form 1099-G
	Unemployment compensation / Paid family leave	Form 1099-G
	IRA or 401(k) distributions	Form 1099-R
	Social Security received	Form 1099-SSA
	Be sure to provide a spreadsheet or notes indica W-2 or Form 1099.	ating additional income not reported on a Form
Expe	nses	
	Health insurance statement	Form 1095-A, 1095-B, or 1095-C
	HSA contributions	Form 5498-SA
	HSA distributions	Form 1099-SA
	Student loan interest	Form 1098-E
	Mortgage interest	Form 1098
	Real estate taxes	Property tax statements
	Moving expenses	Spreadsheet or notes indicating total
-	College expenses	Form 1098-T
	Medical and dental expenses	Spreadsheet or notes indicating total
	Traditional or SEP-IRA contributions	Form 5498
	Cash donations to charitable organizations	Spreadsheet or notes indicating amounts
	Non-cash donations to charitable organizations	Spreadsheet or notes indicating amounts. <i>I total</i> > \$500, <i>include name of organization items donated, date, and value for each donation.</i>
	Car, motor home, and boat registration	Registration notice or notes indicating amount
	Daycare or childcare costs	Notes indicating total paid for each child. <i>Include daycare provider's name, address, phone #, and Tax ID # / SS#.</i>



Estima	ated Tax Payments		
	Any estimated taxes paid	Notes indicating each payment amount and date paid to the IRS and state agency	
Busine	ess Owners		
	Profit and Loss Statement (income and expense report)	Excel files (cash and accrual basis)	
	Balance Sheet	Excel files (cash and accrual basis)	
	General Ledger	Excel files (cash and accrual basis)	
	Journal	Excel file	
	Mileage logs for autos	Spreadsheet or notes indicating the total miles driven for business	
	Payroll Returns	Form 940, 941, DE 9, DE 9C	
	Sales Tax Returns		
Landle	ords		
	Rental income	Form 1099-MISC, spreadsheet, or notes indicating the total income	
	Mortgage interest	Form 1098	
	Real estate taxes	Property tax statements	
	Expenses (utilities, HOA, property management company, etc.)	Spreadsheet or notes indicating the total for each type of expense	
Other	Documents		
	Copies of your federal and state tax returns for the prior year, if not already provided If requesting direct deposit of your refund, your bank routing number and account number, if not already provided		

## If You Are Missing a Form W-2

You can ask your employer to send you a copy of your W-2.

## If You Are Missing a Form 1099

Your banking or financial institution may have the Form 1099 available for download from their website, or you can call their customer service number to get a copy mailed to you.

Your brokerage website may have the Form 1099 available for download from their website, or you can request a copy from your broker.

If you earned \$600 or more in a year as an independent contractor or consultant, your client is required to send you a Form 1099-MISC to report your income. You are still required to report the income on your tax return even if you didn't receive a Form 1099-MISC.

## How to Obtain Copies of Your Tax Documents from the IRS

The IRS receives copies of your tax documents. You can download or request a copy of your Wage and Income Transcript from the IRS by going to <a href="https://www.irs.gov/individuals/get-transcript">https://www.irs.gov/individuals/get-transcript</a>.