MOST COMMON ITEMS WE NEED:

NEW CLIENTS:

1) Electronic copy of most recently filed tax returns, federal, state & local (if applicable), with SSN's redacted or obscured for security purposes (or delivered via our SecureFilePro portal, or other means from your end, such as Google Drive, OneDrive, Dropbox, iCloud, Liscio, etc. (although we cannot vouch for the security of those platforms).
2) Driver's Licenses of both spouses & DOB's of all family members including dependents.

ALL CLIENTS:

3) Items you got in the mail in Jan, Feb, with "Important Tax Document / Info" on outside of envelope (or you retrieved them online because you got a notification email) including the following:
    a. W2's / K-1's
    b. Every version of 1099's that you got (and there are about 15 different versions)
    c. Every form 1098 that you got (and there are seven, most common is mortgage interest statement (1098-MIS), 1098-E (for Education, Student Loan Interest Statement) and 1098-T for Tuition Statement
    d. 1095-A if you got health insurance through healthcare.gov
    e. List of significant life events that occurred during the year, e.g.
        i. Moved
        ii. Bought or sold real estate (We need closing statements for when purchased and when sold)
        iii. Had a kid or sent a kid off to college
        iv. Got married or divorced
4) Any tax notices you may have received from the IRS, state or local taxing agency, that have not been resolved.
5) Any paperwork that has the word "TAX" on it, for the current, or most recently filed tax year.

BUSINESS OWNERS:

6) Electronic copy of most recently filed tax returns, federal, state & local (if applicable)
    a. Profit and Loss Statement (or list of all income and expenses) OR Online Access to your Books (QBO , Xero or other)
    b. Balance Sheet (list of all business assets and debts) if you made more than $250K gross revenue
    c. Business Miles driven during the year (for all family members who worked in the business)
    d. List of any business expenses incurred during the tax year, paid for with personal money or personal credit/debit card (not 12 months of bank statements or a box of receipts), that is not reflected on the P&L
    e. For **BIZ USE OF HOME:** (see Business Use of Home Deduction Items)