

Recent tax law changes have made tax preparation for 2022 taxes a more daunting task than in the past. In order to get the best outcome for taxpayers, it will be in the best interest of the taxpayer to bring all documentation listed below.

There is an extra layer of security to prevent fraud in certain tax credits and or filing status. These include, but are not limited to, filing Head of Household, the Earned Income Tax Credit, Child and Dependent Care Credit and Education Credits. It is our responsibility as preparers to ask questions to ascertain the validity of tax credits and filing status, and have taxpayers sign off on

PERSONAL INFORMATION NEEDED:

- Tax payer number: Social Security Card (SSN) or Individual Taxpayer Identification Number (ITIN) DRIVERS LICENCE
- Home Address & County
- Dependent Information (Full Legal Name, Date of birth, Social Security Number)
- Did you have a foreign bank account Y/N
- Did you receive, sell or exchange cryptocurrency? Y/N
- Did you receive Child Tax Credit Payments? If so, total received? (CT)

DOCUMENTS TO BRING:

- W-2s for each job held during the tax year.
- 1099s All other income reported to the IRS. Includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), NEW for 2020- 1099-NEC for non-employee compensation, miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S) and unemployment compensation (1099-G), State Tax Refund, Unemployment, Social Security, Health Care Reimbursement, Gambling winnings.
- 1098s payments you've made (property taxes, mortgage payments, student loans).
- 1095-A if you received credit from the healthcare.gov marketplace.

- ❑ Income or interest statements received from savings accounts or investments.
- ❑ Bank account numbers: If you wish to receive your refund by direct deposit, you will need to bring a voided check.
- ❑ Record of Estimated Tax Payments Made: Date and Amount Paid
- ❑ Copy of Last Two Years Taxes, if we did not complete the taxes for you.
- ❑ 1099-C Cancellation of Debt

ITEMIZED DEDUCTIONS:

- ❑ Education Expenses: Scholarships, Student Loan Interest, Itemized receipts of qualified educational expenses (Form 1098-T).
- ❑ Child & Dependent Care Expenses: Name, address, Tax ID or Social Security Number of the child care provider.
- ❑ Business Expenses and Assets: For self employed individuals. (Unless we do your books)
- ❑ Educator expenses: If you are a teacher.
- ❑ Charitable Contributions: Detailed list of donations. Have receipts for contributions over \$250. There is an above the line deduction of up to \$600.00
- ❑ Vehicles: Vehicle sales tax paid, personal property tax statement for each car, total miles driven for personal use/business. Keep a detailed log of miles driven for business.
- ❑ Homeowners: Mortgage interest statement (Form 1098), Real estate taxes paid, Statement of Property Tax Payable in tax year.
- ❑ Retirement/IRA: Amount contributed to an IRA/Sep/Simple, and total value as of December 31st of tax year.
- ❑ Moving Expenses: Now only for Military on active duty
- ❑ Alimony Expenses: Ex-spouse's full name and social security number. Alimony is no longer deductible for any agreement modified or executed after 12/31/2018
- ❑ Healthcare Expenses
- ❑ Energy Saving Home Improvements: New limitations apply – credit may be possible for residential energy/solar has credit
- ❑ Electric vehicle purchase-need all documentation of purchase
- ❑ Foreign Taxes Paid
- ❑ Casualty & Theft Losses: This deduction is suspended unless in a federally declared disaster area.