FORMS LIST

Please bring a completed copy of the worksheet/organizer provided or find PDF fillable at https://northglenntax.com/tax-worksheets. Also bring any supporting documentation.

PERSONAL INFORMATION:

- Prior two years income tax returns and two forms of identification **(new client**)
- Name, address, Social Security number and Date of Birth for yourself, spouse and dependents-list on worksheet.
- Market Place Form—must have **1095A** form if you received insurance through the exchange.
- Banking information for Direct Deposit

INCOME DATA REQUIRED:

- Wages (w-2s) and year end paystub
- IRS Notice 1444-C—reporting 3rd Economic Impact Payment received
- Advanced Child Tax Credit amount received—IRS Notice 6419
- Interest and/or Dividend Statements(1099-Int/1099-Div)
- State/Local Income Tax Refunds(1099-G)
- Unemployment Compensation(1099-G)
- Pension/Annuity Statements/IRA Distributions (1099R)
- Stock/Bond Sales Statements(1099B)
- Social Security Income Statement (SSA-1099)
- Royalties/Partnership/SCorp/Trust/Estate Income—usually on a K-1
- Gambling(w-2G)/Lottery Winnings and Losses/Prizes/Bonus
- Alimony Income-Divorce final on or prior 12/31/2018
- Rental Income—see additional worksheet on website
- Self-Employment Income/Contract Labor (1099-NEC)/Business Income—see additional worksheet on website
- Hobby Income
- Any foreign income, bank accounts and or info about property owned outside of the USA
- Any other income items not listed

EXPENSE DATA REQUIRED:

- Dependent Care Costs and Provider Name, Address, Tax ID # or Social Security # and amount paid.
- Education/Tuition Costs/Materials Purchased/Room &Board—**must have 1098-T from Institution** Account transaction history for 2019 year with loan disbursement records, and receipts for out of pocket expenses.
- 529 Education Plan contributions/distributions(1099-Q)
- Student loan interest (1098-E)
- Alimony paid—divorce prior to 12/31/2018
- Medical/Dental Expenses
- Long-term Care letters
- Mortgage/Home Equity Loan Interest/Mortgage Insurance
- Real Estate Taxes
- Sales taxes on big ticket items—cars, RVs, etc.
- Charitable Contributions Cash/Non-Cash—you need to have receipts for all deductions
- IRA Contributions/Retirement Contributions
- Home Purchase/Sale documents
- Moving Expenses—military only
- Estimated tax payment records—list on worksheet.