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
* Banking information for Direct Deposit INCOME DATA REQUIRED:
* Wages (w-2s) and year end paystub
* 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)
* Records of cryptocurrency exchanges
* Sale of property (1099-S)
* 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:

* Market Place Form—must have **1095A** form if you received insurance through the exchange.
* Dependent Care Costs and Provider Name, Address, Tax ID # or Social Security # and amount paid.
* 529 Education Plan contributions/distributions(1099-Q)
* Student loan interest (1098-E)
* Alimony paid or received—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.

Potential Credits:

* Education/Tuition Costs/Materials Purchased/Room &Board—**must have 1098-T from Institution** Account transaction history for 2024 year with loan disbursement records, and receipts for out-of-pocket expenses.
* Energy-efficient home improvements
* Electric vehicle purchase
* Foreign taxes paid (often listed on 1099-Div statement)