**TAX DOCUMENT CHECK LIST**

REQUIRED

* **Names/DOB/Relationship/Address** – You, Spouse, and each dependent
* **Dependents** - Months residing with you
* **Social Security numbers**
* **ID** - License, State ID Card, Passport etc.

COMMON

* **W-2** - forms for you and your spouse
* **W-2G Gambling/Lottery winnings** - & Associated documented Losses (Lucky You)
* **1099-SSA** - Social Security Income
* **1099-G -** Unemployment / FMLA payments
* **1099-R** - IRA/Pension Distributions
* **Interest - Dividends** 1099-INT, 1099-DIV, 1099-B
* **Self-Employment - Income** ((1099K, 1099NEC, expenses, mileage records for Schedule C) (PayPal, UBER - LYFT - DOORDASH etc. Self Employed Health Insurance, Home Office)
* **Bank account** - routing number for Direct Deposit or Direct Debit or paper checks/vouchers
* **1098 – E** Student loan interest
* **1098-T -** tuition & Number of years American Opportunity Claimed (Max 4)
* **Health Insurance** - Connector 1095-A – Premium credit, Health Care Card, Mass HC form
* **Rent Paid in Mass** - Rental Deduction
* **Mass Circuit Breaker Credit** Age 65 and older (RE tax bill, Assessment, Water Bills or Rental info- Landlord name and Address) excludes Subsidized Housing and Married Filing Separately. **Often this credit is overlooked**

**LESS COMMON**

* **Rental property** income, expenses, Section 8 1099-Misc - See **Rental Work Sheet**
* (New Clients **Asset Summary Sheet from last year’s tax return**)
* **Itemization** (Real Estate & Personal property Tax, Mortgage Interest, PMI, Charity, etc)
* **1099-C -** Cancellation of debt
* **1099-S** (sale of a property)
* **Jury Duty**
* **State or local tax refunds** (If you itemized last year (Schedule A))
* **Health Savings Account** distribution 1099-SA & Expenses paid for that distribution
* **Prizes and awards** - 1099MISC
* **Stocks Sales -** 1099B
* **Alimony -** paid/received and date of Court decree
* **Educator Expense -** teachers: expenses paid for classroom supplies, etc.
* **IRA contributions** (Form 5848)
* **Home Energy improvements** (Solar, Windows, etc.)

**Coming soon**

**Entities** - (partnerships, S & C corps, trusts, etc.) income, expenses, P&L, Balance Sheet. **Prior return**