

**Get Your Tax Documents Organized**

To Prepare your Individual Tax Return, documents are essential.

Bring or Upload the following:

Prior year tax return(s)

Bank account routing and account number for direct deposit of refund

SSNs and birthdates of you and everyone you claim in your household

**Photo ID**

**W2** forms from your employer (one for each job)

**1099-INT** from your bank (if you had interest income from savings or checking)

**1099-B and 1099-DIV** from your broker (if you had investment income)

**1099-G** Unemployment Income Statement (if any)

**1099-SSA** Retirement Income Statement (if any)

**1099-R** Withdrawals from retirement accounts (if any)

**1095-A, 1095-B and/or 1095-C** Health Insurance Statement

**1099-SA** from your Health Savings Account provider (if any)

**1099-MISC** for self-employed individuals or contractors

**K-1** forms for Partnership, S Corp, or Estate/Trust income (if any)

**Business records** for self-employed individuals (such as spreadsheets, balance sheets)

**Rental Income** and Expense Records for those who own rental property or rent-out part of their home

**1098 Mortgage** Interest Statement from your Lender

**1098-T** Tuition statement from your school

**1098-E** Student Loan Interest Statement (if you paid interest on Student Loans)

Child care expenses and provider information (including name, address, and tax ID)

Charitable Donations Records / Receipts

Car Tabs (renewals each year)

IRA Contributions

Roth IRA Contributions

Health Savings Account (HSA) Contributions

Employee Business Expenses (uniforms, union dues, job search, unreimbursed travel)

Home Office information (sq ft of home, sq ft of Office)

Medical Expenses (only if you had a lot of medical expenses)

Moving Expenses (if you moved for job purposes)

Certificate of Rent Paid (**CRP**) from your landlord (for renters)

Property Tax Statement (for homeowners)

Closing Statement (called HUD Statement) from your closing papers (if you bought a home)

**Get a Secure Upload Link by emailing a request to [1040@atzel.com](mailto:1040@atzel.com)**

## Privacy Policy

Your privacy is important. Please read the following privacy policy.

I collect nonpublic personal information about you from various sources, including:

- Interviews regarding your tax situation
- Organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data
- Tax-related documents you provide that are required for preparing tax returns, such as W2, 1099-MISC, 1098, 1099-R, 1099-INT and 1099-DIV, and stock transactions
- I do not disclose any nonpublic personal information about clients or former clients to anyone, except as required by law.
- I maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any questions about our privacy policy, please contact me.

Sincerely,

Amy Atzel  
*President, ATZEL, LLC*

ATZEL, LLC  
1040.atzel.com  
651-300-4867