

Upload the following:

- Prior year tax return(s) (New Clients Only)
- Bank account routing and account number for direct deposit of refund
- SSNs and birthdates of yourself and everyone you claim in your household
- State Photo ID – current and not expired

Typical Tax Documents:

- **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** Government / Unemployment Income Statement (if any)
- **1099-SSA** Retirement Income Statement (if any)
- **1099-R** Withdrawals from retirement accounts including rollovers (if any)
- **1095-A, 1095-B and/or 1095-C** Health Insurance Statement
- **1099-SA** from your Health Savings Account provider (if any)
- **1099-NEC** for self-employed individuals or contractors
- **1099-MISC** for rent income, royalty income, and other
- **K-1** forms for Partnership, S Corp, or Estate/Trust income (if any)
- **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)
- K-12 Education expenses (after school enrichment, tutoring, arts, music lessons, not sports)
- Charitable Donations Records / Receipts
- Medical Expenses (only if you had a lot of medical expenses > 7.5% of your income)
- Car Tabs (renewals each year)
- Traditional IRA Contributions
- Roth IRA Contributions and Roth Conversions
- Health Savings Account (HSA) Contributions
- Property Tax Statement (for homeowners)
- Closing Statement (called HUD Statement) from your closing papers (if you bought or sold a home)

Business records for Self-employed Individuals (such as spreadsheets, Profit & Loss Statement):

- Records of your income (including all cash, checks, 1099-MISC, 1099-NEC, and PayPal, etc)
- Records of business expenses such as: advertising expenses, office expenses, mileage (with odometer readings at beginning and end of the year), phone, internet, equipment purchases, rentals, tools, software, supplies, travel expenses (flights, meals, parking).
- Home Office information (sq ft of home, sq ft of home office)
- Records of health insurance costs.
- Records of any quarterly taxes (FED and STATE) paid during the year.