DOCUMENTS NEEDED
TO PREPARE YOUR 2024 TAX RETURN

Following are the documents needed to prepare your tax return. Provide all items that are applicable to you. Look at your most recent tax returns and make certain that you either have a tax form from every person / organization from which you received one in that year, or know why you do not have that form for the current year.

ITEM	DESCRIPTION / NOTES
Government-issued photo ID for you and your spouse (if married)	Driver's license, military or other government-issued ID card
Your Social Security card (and that of your spouse, if married)	
Social Security card(s) for each of your dependents (everyone who will be listed on your return) OR ITIN numbers for everyone named on your return	
Your most recent Federal and state tax returns	
Wages / Salary from employment (Form W-2)	These are the documents from your employer showing your wages / salary for the year
SSA-1099-R	Pink and white statement from Social Security Administration showing benefits received in 2024
Form 1099-R	Income received by way of a distribution from a profit-sharing, retirement, IRA, annuity, pension, insurance contract, or survivor income benefit plan.
Form RRB-1099-R	Retirement / pension income from you or your spouse's railroad retirement
Form 1099-G	This document is used to report any State/Local tax refund AND/OR unemployment compensation you received
Form 1099-INT / 1099-DIV – Interest and Dividends	You may receive these from your bank, credit union, investment firm, and other sources of interests or dividend income
Form 1099-SA	Distributions From an HSA, Archer MSA, or Medicare Advantage MSA
Form 1099-Misc	Reflects income received from royalties, rents, prizes or awards, or medical and health care payment
Form 1099-NEC	Reflects income received for work performed as an independent contractor or for self-employment
Expenses and mileage information related to your self-employment	
Records of all digital asset transactions	Bitcoin, Ethereum, XRP, etc.
Documentation of all cash income you received	All cash income is reportable and subject to tax; do not include any income you received that is reflected on one of your other tax documents

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ITEM	DESCRIPTION / NOTES
Form 1099-K	You may receive this form if you performed for-hire driving services or if you received income through a third-party payment network (Uber, Lyft, Door Dash, Grub Hub, etc.)
Capital gains information	Brokerage statements, etc., showing your stock, bond, or other investment transactions
Form 1099-S	You may receive this form if you sold a home, residence, or real estate
Schedule K-1	(Form 1065, 1120S, or 1041)
Information regarding alimony you paid or received in 2024	We will need the name of your former spouse and their Social Security number
All information related to Schedule A Itemized Deductions	Medical and dental expenses, taxes and/or interest you paid, gifts to charity, casualty and theft losses, etc.
Information regarding child or dependent care you paid	Please provide the name, address, and EIN of the care provider, as well as the amount you paid and for which child or dependent the care was provided
Amount of any gambling winnings for the tax year	This includes bingo, lottery winnings even if you did not receive a tax document for the amount(s)
Amount of any gambling losses for the tax year, if you had gambling winnings	
Cancellation of Debt Form 1099-C	Received for cancellation/forgiveness of debts
Forgiveness of Main Home Mortgage – Form 982	If part or all of your mortgage was forgiven / cancelled, you will have this form from the lender
Form 1099-Q	You will receive this document if you took a distribution from a Qualified Education Program
Form 1098-T	You will receive this document from educational institutions attended by you, your spouse, or your dependents
Information regarding education expenses	Tuition and fees, required course materials, room & board
Documentation of any rental or royalty income and associated expenses	
Form 1095-A	If you or anyone on your tax return had medical insurance coverage through the Marketplace, information from your Form 1095-A MUST be included on your tax return
Information regarding any estimated tax payments you make to the IRS or your state tax agency	
Proof of bank account routing and account numbers for direct deposit of your refund	Please provide a voided check. (This is the fastest and safest way to receive your refund.)