Needed for Tax Return Preparation:

1. **Taxpayer & Spouse Driver's Licenses or State ID, Social Security Card;**
2. **Dependent's Social Security Cards & Birth Certificates;**
3. **If you are a new client, a copy of your last tax return filed;**
4. **Income & Expense Information:**
   - A. **W-2**
   - B. **W-2 G (gambling winnings)**
   - C. **1099-INT**
   - D. **1099-DIV**
   - E. **1099-R (retirement income)**
   - F. **SSA-1099 (Social Security Income)**
   - G. **K-1 from Partnerships, S-Corporations or Trusts**
   - H. **1099-Q (Qualified Tuition Disbursements)**
   - I. **1099-T (College Tuition Expenses)**
   - J. **1098 (mortgage interest statement)**
   - K. **Real Estate Taxes Paid**
   - L. **Auto Excise Taxes Paid**
   - M. **Contribution Receipts**
   - N. **Medical Receipts**
   - O. **Alimony Paid (Copy of Divorce decree)**
   - P. **Form 8332, Release of Claim of Dependent from the custodial parent**
   - Q. **Form W-10 (Day care form with provider name, tax number and amount paid)**
   - R. **Stock Sale information**
   - S. **Profit & Loss from your business, showing breakdown of expenses by category**
   - T. **Estimated Tax Payments Made (dates and amounts paid)**
5. **Your Current Address**
6. **1099-HC (Health Insurance)**
7. **1095-A (if health insurance is through the health insurance marketplace/masshealth)**
8. **Any Contributions of > $16,000.00 per person**
9. **Banking Information (a voided check is best)**
   - A. **Routing Number**
   - B. **Account Number**
   - C. **Account Type**
10. **For Deceased Taxpayers**
    - A. **Death Certificate**
    - B. **Power of Attorney or Personal Representative Appointment from court**