

## Tax Materials Check List

- ✓ Driver's License or State-Issued ID
- ✓ Forms W-2 for wages, salaries and tips
- ✓ All Forms 1099 or other reporting forms for interest, dividends, retirement, miscellaneous income, Social Security, Unemployment, state or local refunds, gambling winnings, cancellation of debt, etc.
- ✓ Year End Tax Reporting Brokerage statements showing investment transactions for stocks, bonds, etc.
- ✓ Crypto currency reporting statements
- ✓ Schedule K-1 from partnerships, S corporations, estates and trusts
- ✓ If self-employed: records of income and expenses for the business
- ✓ Statements supporting educational expenses, deductions, or distributions, including any Forms 1098-T, 1098-E, or 1099-Q
- ✓ All Forms 1095-A for the advance payment of the Premium Tax Credit for lower-cost healthcare coverage under [healthcare.gov](https://www.healthcare.gov)
- ✓ All Forms 1095-B or C for proof of Health Insurance Coverage
- ✓ Health Savings Account contributions and distributions
- ✓ Statements supporting deductions for mortgage interest, taxes, medical expenses, and charitable contributions (including any Form 1098-C)
- ✓ Copies of closing statements regarding the sale or purchase of real property
- ✓ Legal papers for adoption, divorce, or separation involving custody of your dependent children
- ✓ Any tax notices sent to you by the IRS or other taxing authority including any Identity Protection Pin notices
- ✓ Proof of dependents

## Tax Materials Check List

- ✓ Details of any estimated tax payments
- ✓ Energy Credit documentation for qualifying residential energy credit
- ✓ EV vehicle credit forms
- ✓ Childcare costs with provider information
- ✓ Statements from U.S. Department of Education supporting federal student loan forgiveness
- ✓ Statements supporting receipt, exchange, sale, use, or any other disposition of a digital asset
- ✓ Six-digit Identity Protection PIN for use during calendar year 2025, if sent to you by the IRS
- ✓ Last year's federal and state tax returns (if not done by this office)