



LIST OF DOCUMENTS TO PREPARE YOUR TAXES

The following list covers most of the documents necessary to prepare your tax return:

PERSONAL TAXES:

- Driver's license or official state ID.**
- Copy of federal and state statements from the previous year.
- W-2 forms.
- VOID or voided check.
- 1099G - Unemployment compensation.
- 1095A - Format for all persons who had the Obamacare subsidy in the previous year.
- All 1099-INTs (investment and bank accounts).
- All 1099-div (from investment accounts).
- All 1099-B (from investment accounts).
- All 1099R of income from retirement.
- SSA-1 099 If you receive Social Security income.
- List of medical expenses.
- 1099-K (amount of all reportable payment transactions).
- All 1099-INTs (investment and bank accounts).
- Letter 6419 from IRS (child credit received).
- Letter 6475 from IRS (economic impact - Covid).
- Letter of proof of donations to churches or non-profit foundations.

IF YOU HAVE DEPENDENTS:

- Name, date of birth, social security number of each dependent.**
- Copy of the birth certificates of each dependent.**
- Proof of residence of the children - example letter from the school or doctor.**
- Name, address, SSN or EIN and amount paid to babysitter or Daycare for care (if applicable).**

IF I STUDY IN THE UNIVERSITY:

- Format 1098T of the university - if you or your child studied during 2023 and paid with your own money, whether by credit card, loans, or cash.

IF YOU HAVE PROPERTY HOUSES (HOUSES, LAND ETC) IN THE USA OR ABROAD:

- All 1098 (mortgage interest statements).
- Block and Lot number of properties (for properties in New Jersey).
- Total income of income received.
- Expenses related to investment house (electricity, water, maintenance, repairs, insurance of house, professional expenses example lawyers, accountants).
- Mortgage loan closing documents (if I buy house or refinancing during the year).

IF YOU WORK INDEPENDENT (SELF EMPLOYED):

- All 1099s NEC received.
- All 1099s Miscellaneous received.
- If you do not have 1099. Total income and expenses received during the previous year example: telephone, gasoline, tolls, parking, miles driven, insurance, interest, taxes, rents, office implements, licenses, repairs, employees, and contractors (with or without 1099).
- Federal number of your company - EIN #.
- Sales price and base cost for shares or mutual funds sold (if applicable) Form 8949.
- Contributions to retirement plans, 401 K, IRA's, and Roth IRA's – 1099 form 5498.
- Sales tax receipt if I buy a car during the year.
- Name, address, and SSN / ITIN of contractors to whom you will give 1099.
- Positive Covid test (credit for business owners).

IF YOU HAD BANK OR FINANCIAL ACCOUNTS ABROAD:

- Interest and dividends received from your bank abroad
- Account statement with the name of the financial institution, account number, and maximum balance during the year.