

PERSONAL

- Copy of Driver's License, Address, phone numbers & dependent info - if any changes**
- Copy of Social Security Card(s) - Taxpayer, spouse & dependents ONLY IF WE DON'T HAVE ON FILE
- Copy birth certificate and SS card for dependents on return (we can copy these for you)
- Copy of voided check, or bank statement for direct deposit (we can copy these for you)**

1040 INFORMATION

- Wage Statements - W-2s (please verify personal info correct ex: name,address,SS#,wage amts)
- Form 1099-K if your totals sales and transactions exceed \$600
- Interest and Dividend Income - 1099INT/1099DIV
- State Refund Amount - **only if you itemized the previous year (1099-G)**
- Sale of Securities - 1099B (please provide info for cost basis)
- Year End Investment statements
- Sched C Income (self-employed) - 1099-Misc, Commissions, Earnings & Expenses
- IRA, Pension & Annuities Retirement Income - 1099-Rs
- Income and Expenses from Rental Property
- Royalty, Partnership, Corporation and Trust Income (includes K-1's)
- Farm Income & Expenses
- Unemployment income - 1099G
- Social Security-Railroad
- Jury Duty Pay or Alimony
- Lottery or Gambling Winnings/Losses - W-2G
- Any other income not listed above
- Medical savings accounts/Health Savings Account
- IRA contributions
- Student Loan Interest Paid
- Adoption Expenses
- Educator Expenses
- Educational Expenses -tuition for post-high school (Form 1098-T) & continuing education for adults
- Indiana Edu Deduction - proof of educations expenses for K-12
- Child Care Expenses, Provider's name, address & Tax ID or SS#
- Residential energy efficient purchases (copy of sales receipt & manufacturer certifications)
- Indiana plan - Long Term Care Prem & 529 contributions
- ESTIMATED TAX PAYMENTS** - Please provide proof of payments
- Documents needed to claim EIC**
- ACA form 1095 and/or health insurance info (amt,#of months covered, type of plan...)**

FOR TAXPAYERS WHO ITEMIZE

Standard MFJ is now \$27,700/Single \$13,850/HOH \$20,800

- Medical & Dental Expenses -subject to 7.5 of AGI (includes insurance premiums)
- New Vehicle sales tax (copy of purchase showing sales tax amount) if using sales tax deduction
- Real Estate Tax, Property Taxes (All Indiana Residents, for State Return deduction) provide payment**
- Rent Pd, # of months, Name & Address of Landlord (All Indiana Residents for State Return)**
- Mortgage, Home Equity Loan Interest only if used to improve current home
- Cash receipt and Noncash Charitable Donations

This list is not all inclusive. It is intended as a helpful tool in gathering tax information.

The following information is to help provide two proofs for claiming dependents on your Tax Return

Prove child lived with you in the United State
Document(s) must have

Your U.S. address, your name, child's name
(If you use a P.O Box as your mailing address, you must
Send a completed form 1093, P.O Box Application
stamped By the Post Office)

The dates the child lived at the same address
as you must cover more than half of the currant tax year

if the document has the child's name and your address but
not

your name, you need to send in another document with
your name showing the same address

You can send one or more of the following documents
To prove the child lived with you for more than half of the
Current tax year.

School records (you may need to send one or more school
records)

Medical records from doctors, hospital or medical clinic
(immunization records may not include all the necessary
Information)

Adoption or child placement documents

Court records

Or send dated statements on letterhead from:

Child's school
Child's childcare provider (not a relative)
Child's health care provider, doctor, nurse or clinic
A social service agency
A placement agency official
Your employer
An Indian tribal official
Your landlord or property manager
A place of worship
Shelters