



Tax Specialists *of Northern Colorado LLC*

Things to Bring when Visiting Your Tax Professional

All Individuals

1. Prior year tax return(s), if possible
2. Social security cards and photo identification – government issued, NOT expired
3. Health Insurance information: Dates of coverage for each person on tax return and/or form 1095-A from Marketplace/Exchange if applicable

Children/Dependents

3. Social security cards, dates of birth
4. Child care information (name, SSN or EIN, address, amount paid)
5. If college age, Form 1098-T from college/university (educational expenses)

Employment and Income Information

6. W2 forms from ALL jobs
7. 1099-MISC from all jobs where you were an independent contractor
8. 1099-G from all states where you received unemployment or taxable refunds
9. 1099-R and/or 1099-SSA from all sources of pensions, annuities, retirement
10. K-1 for all sources of income from partnerships, S-Corps, trusts or estates
11. Total alimony received, if applicable

Self-Employment

12. Profit and loss statement or list of income and expenses, mileage log
13. List of assets (items expected to last more than one year) bought: date of purchase, cost and description
14. Amount paid for medical insurance; 1095-A if purchased from Marketplace/Exchange

Investment Income

15. Interest Income (1099-INT)
16. Dividend Income (1099-DIV)
17. Sale of Stock (1099-B); consolidated brokerage statement if applicable
18. Sale of real estate (1099-S) (1099-C or 1099-A if abandoned or foreclosed)
19. Rental income and expenses, i.e., interest, property tax, repairs and maintenance, etc.

Adjustments to Income

20. Health Savings Account (1099-SA for distributions AND 5498-SA for contributions)
21. Moving Expenses (if moved 50 miles CLOSER to work)
22. Alimony paid – will need SSN of recipient
23. IRA contributions
24. Student Loan Interest paid (1098-E from your student loan company)
25. 1098-T: Tuition paid if you or your spouse were students in higher education

Do You Itemize?

26. Total out-of-pocket medical expenses if larger than 10% of your income (7.5% if over 65)
27. Own a home? We'll need 1098 mortgage interest statements and property tax paid
29. Personal property taxes – bring your vehicle registration slip(s)
29. Charitable contributions – Cash donations and non-cash donations – bring your records
30. Job expenses – bring receipts for tools, uniforms, equipment, supplies, log book for business mileage, etc

Office in the Home

31. Square footage of home and office space used
32. Bring total spent for utility bills, HOA dues, rent payment or mortgage interest information