



Client Tax Preparation List

Please use the list below as a sample of which documents to send for your income tax preparation.

Income:

- W-2s
- 1099-Rs
- SSA-1099
- IRA and Roth IRA Contributions or FMV
- 1099-INT
- 1099-DIV
- 1099-G
- 1099-B
- Schedule C (Business Income and Expenses)
- Rentals (Rental Income and Expenses)
- K-1s

Deductions:

- Property Taxes
- DMV Registration (VLF Fees)
- 1098s
- Cash Donations
- Non-cash Donations
- 1095-A, B, C
- Tax Estimates Paid
- Education expense (1098-Ts)
- Child Care expenses (Required information: Name, Tax ID #, Telephone number, Address, and Amount paid)
- Other credits