

Here is a short list of things we may need in order to prepare your tax return:

- W-2s from employers
- 1099s for interest, dividends, sales of stock, unemployment, state tax refunds, miscellaneous income or cancellation of debt
- **Important:** Forms 1095-A, 1095-B or 1095-C for those who have health insurance
- 1098 for mortgage interest or 1098-T tuition statement
- Student Loan Interest statements
- K-1s from Partnerships, S-Corporations, Estates or Trusts
- Property tax statements
- Closing documents from any real estate transactions
- Brokerage statements **Please note:** If you sold stock, we will need to know the date of purchase and original price paid.
- Any correspondence received from the IRS or from state taxing agencies.