

DOCUMENT LIST

1. State ID/Driving License for Primary & Spouse
2. SSN and Date of Birth for Self, Spouse and all Dependents.
3. Current Residential Address, Phone Number, Email Id, School District and Name of County for each state and length of stay in each state.
4. Income Documents - W2, 1099 (Misc, Unemployment, Interest, Dividends, Brokerage, Gambling, Retirement Distribution- 401K or IRA, Lottery Winning, Social Security), Jury Duty Pay, Prizes and Awards, Scholarships and Fellowships, State Income tax Refunds, Schedule K-1
5. Form 1095 for Health Insurance Coverage
6. Written Document for additional Income not reported elsewhere such as Tips, Alimony, Self Employment Income, Rental Income. This could be a spreadsheet, bank statement or any other written evidence.
7. Day care expenses, name, address, phone number and EIN or SSN of day care provider.
8. Any tax related Investment or Expenses such as IRA contribution, Alimony Paid, Adoption Expenses, Real Estate Taxes, Personal Property Taxes (DMV), Mortgage Interest 1098, Student Loan Interest 1098E, Moving Expenses, Charity, Medical and Dental Expenses, Employee Business Expenses, Investment Expenses, Casualty and Theft losses.
9. Earned Income Credit – Proof of Qualified Child living with you.
10. Education Credit – Form 1098T and/or proof of payments.
11. Estimated Tax paid both Federal and State.
12. Copy of prior year return (if available).
13. Bank Routing Number and Account Number (only for direct deposit of tax refund or direct debit if you owe tax).
14. Details of Sale of Home - Form 1099-S, 1099- C if any applicable.
15. Rent Paid for Business and any other Business related Expenses such as Car (Mileage, Make, Value, Toll, Interest paid on Lease Installment).
16. For State credit/deduction provide,
CA – Rent Paid
MA – Rent Paid, Public Transportation Used & Health Insurance
IN – Vehicle Tax paid
WI – Rent Paid – Heat Included or Not
MN – Property Tax paid details
All States - Any special Donation/s to State Authorities