Practical Accounting Services

What to bring to your tax appointment

Personal Documents

- New Clients
    - Client information sheet
    - Copy of last year's tax return

Income

Employment Income

- W-2 form(s) for all jobs last year
- Self-Employment Income
- 1099-NEC and/or 1099-K
- Record of estimated tax payments

Retirement Income

- SSA-1099 form for Social Security benefits
- 1099-R for pension/IRA/annuity income

Other sources of income

- 1099-G for unemployment benefits, refund of state/local income taxes
- Income or loss from the sale of stocks, bonds, or real estate
- Income or loss from rental property
- Alimony received
- Statements for prizes or lottery/gambling winnings
- Interest and dividend statements from banks

Expenses

- Retirement contributions, including a 401(k) or IRA
- Mortgage statements and property tax bills if you are a homeowner
- College tuition (1098-T) and student loan statements (Form 1098-E)
- Childcare expenses, including provider's address and federal tax ID number
- Receipts for charitable donations
- Medical and dental bills (needs to be over 7.5% of gross income)
- Records for supplies used as an educator

Other Tax Documents or Notices

- IRS Notice for your Economic Impact Payments (also known as stimulus checks)
- IRS Notice for Advanced Child Tax Credit
- Form 1095-A if you had coverage through the Health Insurance Marketplace
- IRS assigned PIN notice