**Information Checklist**

* A copy of your prior year tax return, if not prepared by this office.
* Form(s) W-2 (wages, etc.).
* Form(s) 1099 (interest, dividends, etc.).
	+ Please **list all your bank accounts, even if less than $10** and no 1099-INT exists.
	+ Please inform me if you have any foreign bank accounts.
* Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.).
* Form(s) 1098 (mortgage interest) and property tax statements.
* Form 1099-B and Brokerage statements from stock, bond or other investment transactions.
* Closing statements pertaining to real estate transactions.
* Form(s) 1099-K (Merchant Card and Third-Party Network Payments).
* Form 1098-T (Tuition Statement)—please include any payments made by financial aid.
* Any 529 Plan Contributions/Distributions—please provide statements.
* Any Health Savings Account Contributions/Distributions.
* Form 1095-A if you acquired health insurance through the Marketplace.
* A copy of your Driver’s License or State issued ID (front and back).
* **Please provide a voided check even if you have provided in the past.** We are unable to provide direct deposit/withdrawal without a voided check.
* Estimated tax payments (copies of checks and electronic payment confirmations).
* Please **summarize** medical expenses and charitable donations.
* For clothing and household charitable donations:
	+ Please write the name and address of charities, and write the value on the receipt. Go to my website: [www.rossicpa.com](http://www.rossicpa.com), and you will find a link for help with valuations.
* Please inform me of any important new changes, such as: new baby, college students, daycare, retired, loss of job, sold home, etc.
* Retirement Accounts (Form 1099R) IRAs or Employer Provided Plans—please inform me of any transactions (RMDs, contributions, distributions, ROTH IRA conversions, 401K loans, etc.).
* Daycare expenses —provide me with a detailed receipt from the daycare/camp including their **Tax ID and their address.**
* All other supporting documents (schedules, checkbooks, etc.).
* Any tax notices received from the IRS or other taxing authorities.
* **Digital Assets** – Please inform us if you received digital assets a payment for services, or you sold, exchanged or disposed of digital assets.