

## ***What information do I need to prepare your taxes??***

In addition to the usual W-2s, please consider the following list of items that may apply to your tax situation.

- 1) **Interest / Dividends** – this may come from bank accounts or investment accounts. If you pay your property taxes from escrow, you may have a 1099-INT from your mortgage company.
- 2) **IRA's** -
  - Did you take any withdrawals? If so, you should have form 1099-R. Even if you had taxes withheld; the form still needs to be reported.
  - Did you contribute to a Traditional or Roth IRA? If so, please let me know the amount and type of IRA.
- 3) **Pension** – If you've had any pension withdrawals, you should have form 1099-R.
- 4) **Social Security** –
  - If you have begun collecting social security benefits, whether retirement benefits or disability benefits, you will receive a form SSA – 1099.
  - If you are thinking about beginning to collect, please discuss with me whether to withhold federal taxes.
- 5) **Gambling Winnings** – Please provide all forms W-2G. Also, you should obtain your win/loss statement from all the casinos.
- 6) **Unemployment** – Did you or your spouse receive unemployment benefits during the year? If so, please download your form 1099-G from NYS Unemployment website. NY does not mail this form unless you call and request it.

7) **College** –

Did you or your dependent attend college or graduate school in the year?

- If so, please download form 1098-T from the college. This is often only provided electronically to the student and will be in the name of the student.
- Also, print the billing statement for each semester in the year. This can usually be found in the student's school portal. It will show all charges and payments/scholarships/grants.

8) **Student Loans** – Did you make any payments to student loans? If so, please download form 1098-E from your lender which shows the interest paid in the year.

9) **HSA Account** – Do you participate in a Health Savings Account? If so, if you contribute to it (other than through payroll), please provide contributions. If you used any of the money, it needs to be reported (even though it is not taxable if you used it for qualifying purposes)  
FORMS 1099-SA and 5498-SA should be provided by the bank holding the HSA, but you may need to download them.

10) **Sales of Property or Stock** –

All stock sales are reported on Form 1099-B and sometimes are not available until later in March. All sales need to be reported whether a gain or a loss.

Sales of property are reported on Form 1099-S. If it is your primary residence that you sold, and you've lived there at least 2 of the last 5 years, you may or may not have received a 1099-S. But if it was issued, we need to account for it on your return.

11) **Energy Efficient Home Improvements** - Please see items that may qualify, listed on my website

- 12) **Dependent Care Credits (or Daycare credits) -**
- Do you pay for childcare for your child under 13 years old so that you can work?
  - Obtain a statement from your childcare provider that lists their name, address, phone, and tax ID#.
  - Please do NOT pay cash for childcare! NYS will often disallow credits for childcare paid in cash. Please pay your provider with check, credit card, or even Venmo so that it can be verified.
- 13) **Property Taxes** – Do you pay property taxes that qualify for the STAR savings? Please bring your property tax receipts with you, even if you do not itemize. Also, provide the amounts of your STAR checks received in the year.
- 14) **Long Term Care Insurance** – Do you pay for LTC Insurance? If so, there is a credit available in NYS.
- 15) **Alimony** - Did you pay or receive Alimony in the tax year?
- 16) **Volunteer Firefighter / Ambulance Worker?** - Were you or your spouse either of these volunteers for the entire tax year? If so, please provide the name and address of fire house and/or ambulance co.
- 17) **Union Dues?** – Do you pay union dues? Please document.
- 18) **Bank Accounts in Foreign Countries?**
- 19) **Do you use Venmo/PayPal/eBay/Square?** If you receive a Form 1099-K, you need to provide it to me.
- 20) **Bank Account Information** – Please verify if your bank account information is the same as the prior year for direct deposit and/or direct debit.