

**Please provide the following Tax documents needed to prepare your return**

- |                                              |                                                           |
|----------------------------------------------|-----------------------------------------------------------|
| <input type="checkbox"/> W2                  | <input type="checkbox"/> 1099-INT                         |
| <input type="checkbox"/> 1099-DIV            | <input type="checkbox"/> 1099-Comp                        |
| <input type="checkbox"/> 1099R               | <input type="checkbox"/> W2G                              |
| <input type="checkbox"/> Taxpayer's RRB-1099 | <input type="checkbox"/> Spouse's RRB-1099                |
| <input type="checkbox"/> Taxpayer's SSA-1099 | <input type="checkbox"/> Spouse's SSA-1099                |
| <input type="checkbox"/> 1099-Misc           | <input type="checkbox"/> 1099-Q                           |
| <input type="checkbox"/> 1099-B              | <input type="checkbox"/> K-1 Partnerships                 |
| <input type="checkbox"/> K-1 Scorp           | <input type="checkbox"/> K-1 Trusts                       |
| <input type="checkbox"/> 1098 Home Mortgage  | <input type="checkbox"/> 1099-G Unemployment Compensation |

**Please provide the following information needed to prepare your tax return**

- ☐ What is your current address? \_\_\_\_\_
- ☐ Did your marital status change before 12/31/2018? \_\_\_\_\_
- ☐ Were there any changes in dependents? \_\_\_\_\_
- ☐ Did you have any child or dependency care expenses? Please include care provider's name, address, SSN, and amount. \_\_\_\_\_
- ☐ Did you buy or sell stocks, mutual funds, bonds, or other investment properties? \_\_\_\_\_
- ☐ Did you buy, sell, or refinance your home? \_\_\_\_\_
- ☐ Did you donate money, clothes, cars, or stock? \_\_\_\_\_
- ☐ Did you incur any tuition or continuing education expenses? \_\_\_\_\_
- ☐ Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? \_\_\_\_\_
- ☐ Did you and your dependents have health care coverage for the full-year? \_\_\_\_\_
- ☐ Did you receive any of the following IRS documents? Form 1095-A, 1095-B, or Form 1095-C? If so, please send. \_\_\_\_\_
- ☐ For direct deposit, please provide your bank name, routing number, and account number? \_\_\_\_\_
- ☐ Do you want to electronically file your tax return? \_\_\_\_\_
- ☐ Please list any questions or other concerns you might have. \_\_\_\_\_