



## Individual Tax Information Sheet

### Personal Records

- Name, birthday, driver's license number, and social security number for you, your spouse, and any dependent you claim.

### Income Records

- Income from jobs: w2s for you, your spouse, and your dependent.
- Income from gambling or lottery: W2G.
- Income from digital asset: 1099-DA (new form 2025) or statement.
- Investment income: 1099-B, 1099-Div, 1099-Int, K-1s from partnership, trust, estate, or S Corporation, or royalty income, etc.
- Tax refund or unemployment income: form 1099-G
- Alimony received (if the divorce agreement is executed before 12/31/2018).
- IRA/Pension distribution: 1099-R, etc.
- Social Security benefits: SSA-1099
- Contractor Income: 1099-NEC
- Other income: 1099-Misc (royalty, rent, prize and awards, etc.), income from scholarship, 1099-SA (MSA or HAS distribution),
- Business or farming income and expenses: 1099-K, profit and loss statement, balance sheet, capital information, etc.
- Rental income and expenses: report issued by property manager, or profit and loss statement, property depreciation schedule, etc.
- If your business or rental operation is home based, you can claim home office expenses: home size, office size, home expenses, office expenses, etc.
- Income from sales of property (house, cars, assets): 1099-S, basis and improvements, escrow package, etc.
- Cancellation of debt: 1099-C

### Deductions and Credits

- IRA contributions: form 5498
- Energy credits (going away after 2025)
- Student loan interest: form 1098-E
- Medical/Health Savings Account (MSA and HSA) contributions: form 5498-SA

- Self-employed health insurance payments (1095-A if on the market place)
- Keogh, SEP, SIMPLE, Solo 401k, and other self-employed pension plans
- Alimony paid (for agreements before 12/31/2018)
- Educator expenses
- Union dues (only for certain limited professions and self-employed individuals)
- Moving expenses (only for active service members)
- Child/dependent tax credits
- Education tax credit: forms 1098-T (subject to income limitation)
- Adoption tax credit: SSN of child, legal, medical, and transportation costs (subject to income limitation)

We will use the following information to calculate whether itemized deduction or standard deduction is more advantageous to you.

- Child care costs: provider's name, address, tax id, and amount paid
- Home mortgage interest and points you paid: forms 1098
- SALT deduction: state and local tax deduction (property tax plus income tax or general sales tax)
- Investment interest expense
- Charitable donations: cash amounts and value of donated property, miles driven, and out-of-pocket expenses (new above the line \$2000 deduction starting 2026)
- Casualty and theft losses: amount of damage, insurance reimbursements (only in presidentially declared disaster zone for federal tax and some states allow it for state tax)
- The following may still qualify for state income tax deduction: union dues, unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.), tax preparation fee, 529 plan contribution
- Medical and dental expenses
- Gambling losses (to the extent of gambling gains)

**Other information:**

- Estimated tax payment made during the year, prior year refund applied to current year, and any amount paid with an extension to file.
- Direct deposit information: routing and account numbers
- Foreign bank account information: location, name of bank, account number, peak value of account during the year (FBAR report)
- Health Insurance Marketplace statement 1095-A

Thank you for choosing me to assist with your tax related issues. I am committed to servicing you and appreciate the opportunity to do so. Should you have any questions, please do not hesitate to contact me. If you have the documents ready, you can drop them off with me, or send electronically via a secured method. I look forward to hearing from you.