

What to bring to your income tax appointment at Premier Income Tax Services

Personal Info

- Social Security/Tax ID numbers and dates of birth for you, spouse and dependents
 - Photo ID for who is signing return
 - Routing and Account number for bank if you want direct deposit
 - Identity protection PIN if you were former victim of identity theft (comes in mail)
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Income – Business - Investing

- Form W2 from all employers last year
 - SSA-1099 for social security benefits
 - Form 1099-R for retirement draws / pension payments
 - Form 1099-Misc for payments from people who weren't your employer (gig, self employed)
 - Form 1099-K for credit card payments received (selling on eBay, driving for Uber)
 - Forms W2-G from any gambling winnings
 - Form 1099-INT for interest received
 - Form 1099-DIV for any dividends received
 - Brokerage statements from places like Edward Jones or TD Ameritrade
 - Form 1099-B for all stock trades
 - Complete buy/sell list from Coinbase or wherever you buy/sell crypto
 - K-1S from any companies you own, family trusts, estates
 - Business and Farm info
 - Rent house info (income, insurance, interest, taxes and repairs)
 - Investment info- this includes property flipping, collectibles, etc.
 - HUD-1 (closing statement) from any properties bought or sold
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Deductions - Credits – Other

- 1098 Mortgage interest statement (if you are buying your home)
- 1095A Premium Tax Credit- for ACA health insurance
- K-12 Teacher's expenses
- IRA, HSA, SEP contributions
- Education expenses (college and continuing ed and trade schools) and forms 1098T
- Student Loan interest paid (Form 1098-E)
- Childcare paid- provider's Tax ID, address and phone number
- Property taxes paid
- Charitable giving – must bring receipts
- Medical expenses paid with after- tax dollars (see it is over 5% of your income, then bring it)
- ANYTHING ELSE YOU THINK MIGHT BE RELEVANT OR USEFUL