

# ESSENTIAL TAX PREP PAPERWORK

Tax time is here again! Use the following guide to ensure you are completely ready with the paperwork needed to maximize your tax preparation.

## INDIVIDUAL TAX FILERS

- All W-2 forms
- All applicable 1099 forms, such as:
  - 1099 investment brokerage reporting statements
  - 1099-C cancellation of debt
  - 1099-DIV dividends from investment and bank accounts
  - 1099-G unemployment collected (access form online)
  - 1099-INT interest from investment and bank accounts
  - 1099-MISC miscellaneous income
  - 1099-NEC non-employee compensation
  - 1099-Q distributions from a 529 College Savings Plan
  - 1099-R pension and IRA distributions
  - SSA-1099 Social Security benefits
  - Form W-2G gambling and lottery winnings
- All relevant Schedule K-1s from investments in partnerships, LLCs or S-corporations
- Form 1098 Mortgage Interest Statement for all primary, secondary and home equity loans
- Real estate taxes paid (if paid through mortgage, amount appears on Form 1098)
- Settlement statement/HUD 1 for any property refinanced, bought or sold during tax year
- Form 1098-E student loan interest paid
- Form 1098-T tuition paid for qualified higher education costs for taxpayer and dependents
- New York State residents only, year-end statement showing contributions to 529 College Savings Plan
- New York State residents only, copy of driver's license
- Childcare expenses, including amounts, name and address with tax ID number of daycare provider
- Total amounts for cash and non-cash charitable donations (IRS requires documentation to verify)
- Medical expenses, including:
  - Dental and vision
  - Prescriptions
  - Hospital and lab fees
  - Long-term care insurance premiums
  - Supplemental medical insurance premiums
  - Co-payments
  - HSA contributions
  - Medical supplies and medical travel
- Amounts and dates of all quarterly Federal and/or state estimated tax payments
- Total amount for IRA and/or SEP contributions made, or to be made, by tax deadline
- Expenses for energy efficient improvements made to your primary residence
- Any major changes that have occurred within your family, such as divorce, illness, birth or death

## NEW CLIENTS

- Copies of prior year federal and state income tax returns
- Full names, Social Security numbers and dates of birth for taxpayer and all family members claimed as dependents



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## RENTAL PROPERTY OWNERS

- For each property, total gross rental income and rental expenses by category, including:
  - Advertising
  - Commissions/management fees
  - Insurance
  - Mortgage interest
  - Real estate taxes
  - Repairs and maintenance
  - Permits
  - Service contracts
  - Supplies
  - Utilities, etc.
- Settlement statement/HUD 1 for any property bought or sold

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## BUSINESS OWNERS AND SELF-EMPLOYED

- Total gross earnings
- Business expenses analyzed by category, including:
  - Advertising
  - Business gifts
  - Commissions/fees
  - Computer/internet
  - Continuing education
  - Contract labor/W-2 forms
  - Dues/subscriptions
  - Health insurance premiums and premium costs
  - Insurance costs (other)
  - Licenses
  - Loan statements/payments
  - Materials and supplies
  - Meals and entertainment
  - Mileage
  - Office supplies
  - Postage/delivery
  - Professional fees (accounting, legal, etc.)
  - Rent
  - Repairs and maintenance
  - Taxes paid, federal and state(s)
  - Telephone/cell phone expenses
  - Travel
  - Utilities, etc.

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## HOW TO SUBMIT YOUR PAPERWORK

- Submit paperwork as a complete package once you have compiled all documentation
- Include both your phone number and email address
- Mail your package with USPS, FedEx, UPS or other mailing/courier service
- Drop off your package at your convenience
- Email your documents in PDF format to [info@slnjcpa.com](mailto:info@slnjcpa.com)
- Upload your PDFs to our secure client portal at [www.slissnercpa.com](http://www.slissnercpa.com)
- By appointment:** call early to schedule an in-person or phone meeting during tax season, then send your package at least two weeks prior so your draft return will be ready for review
- Call with any questions: (973) 917-4080

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