

Edifi Tax & Consulting

What Should I Bring to My Tax Prep Onboarding Session?

Personal Information For Each Family Member:

- Name
- Date of Birth
- Social Security Card /ITIN/ATIN
- Last Year's Tax Return
- Valid Driver's License

Income & Tax Information

- W-2's
- Interest (1099-INT or substitute)
- Dividend Slips (1099-DIV or substitute)
- Stock Sales (1099-B or Broker Statement)
- Self-Employment Income and Expenses
- Sale of a Personal Residence
- Rental Income and Expenses
- Sale of any Business Assets
- Gambling or Lottery Winnings (W-2G for some winnings)
- State Income Tax Refund (1099-G)
- Pension Income (1099-R)
- Estimated Taxes Paid
- Social Security or Railroad Retirement (SSA-1099 or RRB-1099)
- IRA or 401(k) Distribution (1099-R)
- Unemployment Compensation (1099-G)
- Miscellaneous Income (1099-MISC)

Deductions/Adjustments

- Medical Expenses
- Real Estate or Personal Property Taxes
- Mortgage Interest
- Charitable Contributions (cash and non-cash)
- Gambling Losses
- Moving Expenses
- Traditional IRA Contributions
- Higher Education Expenses
- Educator Expenses
- Student Loan Interest

Tax Credits

- Child Care Provider/Address and Employer Identification Number (EIN) or Social Security Number (SSN)
- Adoption Expenses
- Retirement Savings Contributions Credit