SDA SOMETHING DIFFERENT ACCOUNTING

What You Need for Tax Preparation

Personal Information

- [ ] Driver's License for All Filers.
- [ ] Social Security Information.
- [ ] Dependent Name, Social Security Information and Date of Birth.
- [ ] Copy of Prior Year State and Federal Return and all Schedules.
- [ ] Banking information and voided check for payment or refund processing.
- [ ] Cash and Non-Cash Charitable Donations (Even if Not Itemizing) |
- [ ] All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit.
- [ ] Out of pocket Medical, Eye Care, and Dental Expenses
- [ ] Mortgage Interest Statements (1098)
- [ ] Student Tuition Deductions - Undergraduate or Graduate?
- [ ] Statements supporting educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q

Income Information

- [ ] Forms W-2 for wages, salaries, and tips.
- [ ] Forms 1099-G for unemployment income.
- [ ] All Forms 1099 for interest, dividends, retirement, miscellaneous income, Social Security, state or local refunds, gambling winnings, etc. or debt cancellation.
- [ ] Brokerage statements showing investment transactions for stocks, bonds, etc.
- [ ] Schedule K-1 from partnerships, 5 corporations, estates and trusts.
- [ ] IRA Contributions
- [ ] Commissions
- [ ] Rental Property Income (HUD Settlement Statement, Income and Expenses)

Business Information

- [ ] Self Employed Income and Expenses
- [ ] Income and Expenses for Rental Property
- [ ] Closing statements for purchase or sale of Rental Property
- [ ] Business Fixed Asset list
- [ ] Business Use of Vehicle Information, miles driven for business, year, make, model, year put in service.
- [ ] Home Office information, square footage, expenses etc.
- [ ] Estimated Tax Payments
- [ ] State and Local Tax Returns
- [ ] 1096 and 1099NEC Copies
- [ ] Payroll Returns (If Applicable) 941, 940, W2/W3