

What to Bring to Your Walk-in or Remote Appointment for 2025 Tax Year

(as well as for Your Remote Tax Filing) *

Tax Forms and Other Information about Your Income:

IRS Income Tax Forms	
Social Security Card and Employment Authorization Document (EAD), if your SS card requires it	Form 1099-G (unemployment compensation, or state, or local tax refunds)
Driver's License/ State Issued ID	Form 1099-C (canceled debt amount)
Form W-2 (wages)	Form 1099-R (payments/distributions from IRA or retirement plans)
Form W-2G (lottery or gambling winnings/losses)	Form 1099-MISC (rents, royalties, prizes and awards)
Form 1099-NEC (nonemployee compensation)	Form 1099-S (income from sale of a property)
Form 1099-K (payment card, apps and marketplace transactions)	Forms 1099-INT, 1099-B, 1099-DIV, 1099-DA, K-1 (interest, dividends, investments, crypto sales)
Form SA-1099 (Social Security Benefits)	Forms K-1 (income from companies)
Other Income Tax Information	
Last year's Federal personal (Form 1040) and corporate (Forms 1120, 1120-S, 1065), and States tax returns (for new clients only)	Rental Property Income and Expenses **
Net Profit from Business Worksheet** (income and expenses for self-employed individuals)	Alimony received
Corporate Financial Statement**/ Profit & Loss with Balance Sheet Statements (income and expenses for companies)	Business or Farming Income Information, Profit & Loss Statement, capital equipment information
Foreign income, foreign bank accounts, financial interest in or signature or other authority over foreign financial accounts (location, name of bank, account number, peak value of account during the year, the aggregate value of the financial accounts)***	

Tax Forms and Other Adjustments to Income and Deductible expenses:

Form 1095-A (health insurance Marketplace Statement)	Alimony paid (for divorces finalized before 2019)
Child and dependent care expenses and the care provider's name, address, EIN/SSN	Receipts for qualified energy efficient home improvements
Form 1098-E (student loan interest paid)	Records of IRA contributions made during the year
Form 1098-T (tuition paid) or receipts/canceled checks for tuition paid for post-high school)	Receipts for new qualified plug-in electric drive motor vehicle or previously owned clean vehicle
Form 1098 (mortgage or home equity loan interest paid)	Medical and dental expenses records**
Form 1098-VLI (vehicle loan interest paid)	Estimated taxes or foreign taxes paid for the year***
Receipts for any qualifying energy-efficient home improvements (air conditioners, exterior doors, windows, etc.)	Record of purchase or sale of business and personal residence (HUD, Settlement Statement), other business property (Bill of Sales, etc.)
Records of Health Saving Account (HSA), Medical Savings Account (MSA) contributions	Real estate taxes, personal property taxes, state taxes paid **
Self-employed health insurance payments records	SEP, SIMPLE, and other self-employed pension plans contributions
Charitable donations (cash amounts, official charity receipts, canceled checks; value of donated property; miles driven and out-of-pocket expenses) **; qualified one-time charitable distribution from individual retirement account	

* The list of documents is a basic template and is not exhaustive; additional tax forms and information may apply.

** Worksheets are available for downloading and filling out on the main page of our website.

*** Information is required for all US tax residents.