

DOCUMENTS TO BRING WITH YOU

Required:

- Photo ID for you (and your spouse if filing jointly)
- Social Security card for you, your spouse and your dependents
- Bank account and routing number for direct deposit
- Last year's tax return, including the Iowa return
- Any correspondence you received from the IRS during the year
- Your tax documents
- Identity Protection PIN if you have one for anyone on your tax return

Tax Documents you might have:

- Form W-2 – Wages/Salary from every employer
- Form 1099-R – Distributions from Pension, IRAs, Annuities for each account
- Form SSA-1099 – Social Security Benefit Statement
- Form RRB01099-R – Railroad Retirement Board statement
- Form 1099-G – State Income Tax Refund
- Form 1099-G – Unemployment Compensation
- Form 1099-INT – Interest income
- Amount of interest earned, but no 1099-INT received
- Form 1099-DIV – Dividend Income
- All information related to itemized deductions (health insurance premiums, property taxes, mortgage interest, car registration, charitable contributions, medical expenses, etc.)
- Child or Dependent Care expenses (Care provider name, address, EIN/SSN, amounts paid for each dependent)
- Form W-2G – Gambling winnings (and documentation of any losses)
- Brokerage Statements (Form 1099-B)
- Form 1098-T – Tuition Statement for claiming Education Credit and School Financial Statement showing expenses and amounts paid. Please also bring any educational expenses not incurred through the school
- Information about any estimated tax payments made for federal or state taxes
- Form 1099-C - Cancellation of Debt
- Form 1095-A – Statement for health insurance purchase in the Government Marketplace
- Form 1099-MISC – miscellaneous income from royalties, rents, prizes, clinical trials, etc.
- Form 1099-NEC – Nonemployee Compensation
- Documentation of all cash income received for Self-Employment
- Expenses and mileage records for self-employment
- Form 1099-K – Payment Card and Third Party Network Transactions
- Form 1099-S – Proceeds from Real Estate Transactions
- Schedule K-1 (please check with us in advance as we are not trained on all K-1's)
- Information regarding alimony you paid or received
- Form 982 – Forgiveness of Main Home Mortgage
- Form 1099-Q – Payments from Qualified Education Programs (distributions from Section 529 Savings Plan)
- If you need to do a prior year return for 2019, 2020 or 2021, please bring a record of all economic stimulus payments, advance child tax credit received and your last tax return filed.
- Form 1098E – Student Loan Interest
- Educator expense receipts if you are a teacher or para-educator working at least 900 hours per year..