

Below please find a sample list of documents, to be included but not limited to, when submitting your [tax documents](#) for filing. Please note all clients must submit a clear legible copy of their State Issued Identification, Non-Driver's or Driver's License, required every year, both front AND back and the completed [Engagement Letter](#) and the [Client Information Sheet](#).

Marriage	Prior year return of both spouses
Divorce	Copy of the divorce decree
Birth or Adoption	Social Security cards and/or adoption papers
Death of Spouse or child	Date of death or death certificate
Additional members of household	Date of occupancy and relationship
Job change	Start date and name of new employer W-2s from new and old employers
Unemployment	Form 1099-G
Retirement contribution	Type of plan and amount
Retirement distributions	Form 1099-R
Social Security benefits	Form 1099-SSA
Sale of stocks, bonds, etc.	Form 1099-B or other sale documents
Purchase of stocks, bonds, personal residence, real estate	Purchase documents; closing papers
Inheritance	Will; K-1 from the estate
Rental Property	Income, expenses, new property purchased
Prizes	Form 1099-MISC ; value of prizes not included on 1099-MISC
Lottery or Gambling winnings	Total amount won whether on W-2G or not; total amount of losses



Health Insurance, medical, dental, or drug expenses	Provide form 1095A , 1095B , or 1095C . Health insurance premiums; if it is an employer-sponsored plan, know whether it is paid with pretax dollars; totals of other medical, dental, and drug expenses
State income or property taxes paid	Prior year's income tax return; property tax bills; closing papers from the purchase or sale of property; letter from the state regarding any change in a prior filed return
Charitable contributions of money, property or out-of-pocket expenses	Date and type of contributions, Knowledge that receipts from the organizations have been received; mileage log for charitable work
Trade any property	Date of trade, property given up and property received, basis and FMV; qualified intermediary sales agreement or closing papers
Start or end a small business	Formation or termination dates; Property contributions or distributions
Lawsuit Settlements	Date received; reason for the settlement; 1099-MISC
Purchase or refinance a home	Closing papers from purchase; Forms 1098

