



2022 Tax Documents

Please Bring All of the Following with You:

- All copies of W-2
- 1099 forms reporting all: Interest & Dividends from Savings Accounts, Money Markets, Mutual Funds, Stocks, Bonds, Etc.
- 1099 form: Non-Employee Compensation
- 1099 form: Unemployment Compensation (Insurance)
- 1099-B forms reporting all Stock sales for 2022 as well as original purchase date and cost information
- 1099 forms for all Retirement Fund transfers and Social Security benefits
- Social Security numbers and dates of birth of all dependents (if not previously supplied)
- Copies of all K-1's (Partnership and S Corporation)
- Schedule summarizing business or rental income and expenses if applicable
- Date and amount of each estimated tax payment
- Name, address and I.D. or Social Security number of all child care providers and amounts paid for each child per provider
- Itemized Deductions:
 - Medical Expenses
 - Home Mortgage Interest
 - Real Estate Taxes
 - Charitable Contributions, Cash and Non-Cash
- Copy of 2021 Tax Return (for new clients only) and New Client Info Organizer
- Closing Papers for:
 - Purchase of NEW Residence
 - Purchase of OLD Residence
 - Sale of OLD Residence in 2022
 - Any Refinancing done in 2022
- Alimony (paid or received) - Need to/from name, Social Security number, amount and date of original settlement
- If assigned, the IRS issued Identity Protection PIN for Taxpayer and/or spouse for Tax Year 2022
- Year End IRA and 401K Statements