



Income:

- W-2's (one from each job)
- 1099's (other income)
- Home interest 1098 if you own a home
- Bank account interest statements
- Last Year's state refund amount (1099-G)
- Unemployment compensation
- Social Security Statement
- Retirement account withdrawals (early or timely)
- Social Security Statement

Other:

- Insurance Card or 1095-A if you had coverage from the health care exchange
- Divorce Decree if you have dependants that are covered by another person's plan
- Previous year's return(s) if you are new to me.

Deductions:

- Dependant Social Security card and birthday
- Medical or School Record to Show they lived with you
- Home interest 1098 if you own a home
- If you refinanced in 2014 call me
- Charitable donation records both cash and items
- Daycare payment record
- Any other documents that say "Important Tax Document"

Business:

- Profit & Loss or Income list
- Categorized expense totals*
- Trade income
- Sales Tax Forms
- 1099's received
- 1099/1096 Issued
- W2/W3 Issued
- For LLC or S-Corp (Operating Agreement, Asset List, and Previous Year Return)

*Available at implextax.com under the downloads tab, Chose the one closest to your business. If there is not one that is close use the self-employment form.