

What to Bring to Have Your Taxes Prepared: Please go through this list carefully so that you can provide us with everything we need to complete your return accurately.

Identification

	Photo ID – Driver’s license or state ID preferred – for both spouses if married. Both spouses must be present to sign the return unless one spouse has power of attorney for the other.
	Social security cards or Social Security statement (SSA-1099) OR Individual Taxpayer Identification Number (ITIN)
	Social security number for ex-spouse, if receiving or paying alimony
	IRS identity protection PINs (IPPIN) if anyone has one
	A copy of the previous year’s return, if possible
	If a dependent must also file a return, we should do both at the same time

Required Intake Forms

	Federal Intake Booklet - This form is 8 pages long. Please fill out the entire form, answering all the questions (except the areas in gray that are labeled for a “Certified Volunteer Preparer.”) This form can be downloaded and then filled out on your computer before printing
	Wisconsin Information Sheet - This form is two pages long. It can be downloaded and then filled out on your computer before printing.

Income information

	W-2 forms from all employers
	W-2G forms for any gambling winnings and a record of ALL wins and losses, if available
	SSA-1099, RRB-1099 social security forms
	1099-R, RRB-1099-R, CSA-1099/R forms from annuities or pensions If box 9b has an amount shown, the date of retirement or first annuity payment
	1099-MISC or 1099-NEC forms for other income or non-employee income
	1099-B forms, often included in broker statements (bring ALL broker statement pages)
	1099-C cancellation of debt (for non-business credit cards or primary home mortgage only)
	1099-DIV forms, often included in broker statements
	1099-G forms from state refunds or unemployment payments
	1099-INT forms from bank accounts. If interest is under \$10, one may not be issued, so bring the amount of interest (it’s still taxable)
	1099-OID forms, often included in broker statements
	1099-S forms from real estate transactions, if any. If you sold a home, bring sales and original purchase document also.
	K-1s from oil/gas royalties, partnerships or trusts
	Rental Income received (only land – all other rentals need professional tax preparer help)
	Alimony received (and ex-spouse social security number)

Self-employment income

	A summary of cash income
	1099-K forms showing income payments
	1099-MISC forms for work done for others

	A list of all expenses related to your business
	Miles driven (actual costs and depreciation need professional assistance)

Deductions

	Medical expenses – please total by hospital, doctors & dentists, prescription drugs, medical equipment, miles driven
	Contributions – Miles driven, please estimate the value of non-cash donations
	1098 forms showing mortgage interest payments
	1098-E student loan interest statements
	1098-T tuition statements
	Scholarship information – amount, restrictions on use of funds
	Details of education expenses – tuition, books and equipment, how and when paid for (student’s account printout if possible)
	Sales tax paid on major items (vehicles, boats, appliances)
	Classroom supply expenses for teachers
	Energy efficient home improvements (windows, insulation, furnace, hot water heater)
	Child care costs – name, address, tax ID, amount paid
	Union dues, unreimbursed business expenses

Other

	1095-A forms to show Federal Marketplace health insurance coverage
	1099-Q forms from qualified education programs
	1099-SA forms showing distributions from health savings accounts
	5498 forms showing IRA contributions
	5498-SA forms showing health savings account information
	Estimated tax payments made
	Prior year refund applied to this year
	Carry-over capital gains losses from the previous year
	A rent certificate or property tax bill if you will be claiming a Homestead Credit
	If you are claiming a Homestead Credit and you are under 62 years of age you must have earned income (W-2) or have proof of disability. See instructions under Homestead in the menu on the left.
	The amount paid for any purchases for which you did not pay sales tax (i.e., on-line purchases)
	Any tax-related communication from Wisconsin or the IRS during the past year
	A check showing routing and account numbers, if you wish to do direct deposit of your refund