



Personal Tax Preparation Documents List

The following is a list to help our customers gather information for the personal tax preparation service.

Personal Information	Dependents Information
<ul style="list-style-type: none"> • Your social security number or tax ID number • Your spouse's full name and social security number or tax ID number • Amount of any alimony paid and ex-spouse's full name and social security number • Your tax returns for the previous three years. We will be glad to check them for accuracy • Information About Other People Who May Belong on Your Return 	<ul style="list-style-type: none"> • Dates of birth and social security numbers or tax ID numbers • Childcare records (including the provider's tax ID number) if applicable • Income of other adults in your home • Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable) • Education Payments
Education	Employment
<ul style="list-style-type: none"> • Forms 1098-T from educational institutions • Receipts that itemize qualified educational expenses • Records of any scholarships or fellowships you received • Form 1098-E if you paid student loan interest 	<ul style="list-style-type: none"> • Forms W-2
Self-Employment	Business Use Vehicle
<ul style="list-style-type: none"> • Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s • Records of all expenses — check registers or credit card statements, and receipts • Business-use asset information (cost, date placed in service, etc.) for depreciation • Office in home information, if applicable 	<ul style="list-style-type: none"> • Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage • Amount of parking and tolls paid • If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.
Rental Property Income	Retirement Income
<ul style="list-style-type: none"> • Records of income and expenses • Rental asset information (cost, date placed in service, etc.) for depreciation 	<ul style="list-style-type: none"> • Pension/IRA/annuity income (1099-R) • Social security/RRB income (1099-SSA, RRB-1099)
Savings & Investments	Other Income
<ul style="list-style-type: none"> • Interest, dividend income (1099-INT, 1099-OID, 1099-DIV) • Income from sales of stock or other property (1099-B, 1099-S) • Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B) 	<ul style="list-style-type: none"> • Unemployment, state tax refund (1099-G) • Gambling income (W-2G or records showing income, as well as expense records) • Amount of any alimony received • Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC) • Jury duty records • Hobby income and expenses • Prizes and awards • Other 1099

Affordable Care Act	Other Deductions
<ul style="list-style-type: none"> • Form 1095-A if you enrolled in an insured plan through the Marketplace (Exchange) • Marketplace exemption certificate if you applied for and received an exemption from the Marketplace (Exchange) 	<ul style="list-style-type: none"> • Receipts for classroom expenses (for educators in grades K-12) • Form 5498-SA showing HSA contributions • Record of moving expenses not reimbursed by employer • Forms 1098 or other mortgage interest statements • Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid • Real estate and personal property tax records • Invoice showing amount of vehicle sales tax paid • Cash amounts donated to houses of worship, schools, other charitable organizations • Records of non-cash charitable donations • Amounts paid for healthcare insurance and to doctors, dentists, hospitals • Amounts of miles driven for charitable or medical purposes • Expenses related to your investments • Amount paid for preparation of last year's tax return • Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel) • Job-hunting expenses • Receipts for energy-saving home improvements • Record of estimated tax payments made
IRA Information	Federal Declared Disaster
<ul style="list-style-type: none"> • Form 5498 showing IRA contributions • Traditional IRA basis 	<ul style="list-style-type: none"> • City/county you lived/worked/had property in • Records to support property losses (appraisal, clean-up costs, etc.) • Records of rebuilding/repair costs • Insurance reimbursements/claims to be paid • FEMA assistance information • Check FEMA site to see if my county has been declared a federal disaster area

BBN Business Solutions

**Feel free to call us if you have any questions at 321-557-1424 or 321-209-1778.
Address and hours please visit us online at www.BBNBusinessSolutions.com**