

How to Prepare For Your Tax Appointment

With On Demand Mobile Notary Services and Taxes

Personal Information:

- **First year clients-** you will need to provide a copy of your current driver's license or state identification for both the taxpayer and spouse or domestic partner.
- **Returning clients-** you will only need to provide a copy of your renewed driver's license or state identification if it has been renewed since the last time you filed your tax return with us.

Dependent(s) Information:

- First year clients- you will need to provide a photocopy of each dependent's birth certificate, social security card, and proof of residence.
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable).
- Returning clients- each year you will need to provide a proof of residence document for each dependent (i.e. : school or daycare documents, medical or dental bills, bank statements, 1095-B

Sources of Income:

- Employed (W2)
- Unemployed, State tax refund (1099-G)

Self-Employed:

- Forms 1099, income records that show amounts not reported on 1099's
- Copy of all expense totals and categories
- Business asset usage for depreciation (cost, date asset placed in service)
- Home office information (if applicable) total sq ft of home, sq ft of office room only, expenses directly related to the home office business
- Record of estimated tax payments made (date payment made, amount of payment) Form 1040-ES

Retirement Income:

- Pension/IRA/Annuity Income (1099-R)
- Traditional IRA basis (amounts that you were already taxed)
- Social Security (1099-SSA)
- Railroad Retirement Board (RRB-1099)

Savings & Investments or Dividends:

- Interest Income (1099-INT)
- Dividend Income (1099-DIV)
- Original Issue Discount (1099-OID)
- Income received from sales of stock or property, include dates of acquisition and records of basis in the property you sold if it was not reported on the 1099-B (1099-B, 1099-S)
- Health Savings Account/Long-Term Care Reimbursements (1099-SA, 1099-LTC)
- Estimated tax payments made and dates (1040-ES)
- Transactions involving Virtual Currency or Bitcoin
- Any expenses related to your investments

Other Income and Losses:

- Gambling income (W-2G or records showing this type of income and expenses)
- Jury Duty
- Prizes/Awards
- Royalty Income (1099-MISC)
- Record of alimony paid and received with ex spouse's name and social security number
- All other 1099-MISC's

Deductions: If you are itemizing you will need to gather these documents

Home Ownership

- Mortgage Interest Statements (1098 Forms)
- Real Estate and Property Tax Statements
- Record of energy saving home improvements (solar panels, solar water heater)

Charitable Donations

- Cash donation amounts (if values are over \$500 then you will need to provide the dates donated, name of organizations)
- Non-cash charitable donation amounts (if values are over \$500 then you will need to provide the dates donated, name of organizations)
- Charitable miles driven for either charity or medical

Medical Expenses

- Amounts paid for healthcare insurance to hospitals, dentists and doctors

Health Insurance Proof

- 1095-B or 1095-A

Childcare Expenses

- Fees paid to a licensed daycare provider that have not been paid through a flexible spending account at work. (include the provider's name, EIN number, address, phone number)

Educational Expenses

- 1098-T form from an educational institution
- Receipts for book and or other qualified education expenses
- Paid student loan interest(1098-E)

K-12 Educator Expenses

- Receipt totals for classroom expenses

State/Local Taxes

- Amount of state or local income or sales tax paid other than your wage withholdings
- The long new car sales invoice showing the sales tax paid

Retirement/Savings

- HSA contributions (5498-SA form)
- IRA contributions (5498 form)
- Any other 5498 forms

Federally Declared Disaster

- Records of property loss (appraisal, cleanup costs, etc)

- Records of rebuilding/repair costs
- Insurance reimbursements/claims paid

Other

- Safety deposit box
- Union dues
- Vehicle registration fees paid
- Energy credit for vehicle
- Adoption expenses