

Documents required for tax preparation.

General

- Last year's federal and state tax returns (for new clients)
- Income/wage statements:
 - W-2s
 - 1099s
 - Alimony received or paid
 - Commissions received statement
 - Brokerage account year-end statements
 - ESPP statements
 - Stock options sale papers
 - Rental property income and expenses
 - Partnership, S Corp, trusts, or estate yearly statements
 - Pension or retirement income statements
 - Social security income yearly statement
 - Unemployment income yearly statement
 - State income tax refund statement
 - Lottery/gambling winnings (and lottery losses, if you have winnings)
- Car, motor home, and boat registration paperwork
- Donation receipts

Homeowners

- Mortgage interest year-end statement
- Home equity line of credit year-end statement
- Property tax information
- If you sold your home:
 - purchase information
 - home improvement information

Businesses

- Income and expense reports
- Mileage logs for autos
- Receipts for business assets purchased

Students (full time or not)

- Tuition and education fees
- Student loan information
- Grants and scholarship information

- IRA contributions
- Child care expenses and provider information
- Medical expenses
- State taxes paid
- Unreimbursed employment-related expenses
- Job-related educational expenses
- Casualty or theft losses
- Foreign taxes paid