

- Social security numbers and dates of birth for any new dependents
- Copy of 2012 tax returns - for new clients only
- W-2 forms from each employer during 2013
- 1099-INT & 1099-DIV forms for Interest and dividend income, all other 1099 forms
- 1099 and 1099-R forms for pensions & retirement, & SSA-1099 for Social Security
- 1099-B forms for the sale of stocks or mutual funds and cost basis
- 1099-G forms for state tax refunds, gambling winnings, or lottery proceeds
- 1099-C or 1099-A for any cancellation of debt income or foreclosure of a residence
- 1098 forms for mortgage and home equity loan interest, Real estate taxes, PMI (mortgage insurance premiums) paid in 2013
- 1098-T forms and printout of student's account from Educational Institutions for Tuition and Fees paid in 2013
- Schedule K-1's from partnerships, S corporations, trusts and/or estates
- Records regarding rental income and expenses
- Alimony paid or received, including name and social security number of recipient (please bring a copy of your divorce decree)
- Records of a 2013 purchase and/or sale of a personal residence, including closing statements
- Summary of medical and dental expenses paid in 2013 including insurance reimbursements
- Schedule of estimated taxes paid for federal, state, and local taxes
- Job-related out of pocket expenses; if you are a teacher, we need your classroom expenses.
- Information on charitable donations including those made by check or credit card payment; also, non-cash of clothing and household items, etc.
- Child-care expenses and provider information, including name, address, phone number and tax identification number
- Information on IRA & HSA contributions or withdrawals
- Information on KG through 12 educational expenses for IL tax credits
- Records regarding vehicles purchased or leased in 2013 if claiming business use; mileage records for business use of automobiles
- It would be helpful to enclose a voided check if you wish to have your refund deposited directly into your bank account or if you wish to use electronic funds withdrawal to pay any balance due.