

The information needed for your return will include

- Forms of Income (1099, W2)
  - 1099- NEC
  - 1099-INT
  - 1099-DIV
  - 1099- MISC
  - 1099-SSA
  - 1099-R
- Any Mortgage interest statements (If applicable) 1098
- Form 1095 - Insurance (if applicable)
- Virtual Currency? Foreign Accounts?
- Driver's License information (Tax Payer & Spouse)
  - Issue Date
  - Expiration Date
  - DL #
- Direct Deposit information
- Cash Donations? Charitable Contributions?
- Previous 2 years Tax Return
- Dependents?
  - Full Name
  - Social Security Numbers
  - Date of Birth
  - Relationship to Tax Payer
  - # of months in the household
- Medical Expenses & Prescriptions (out of pocket, if itemizing)
  - Eye Doctors
  - Chiropractors
  - Medical Equipment
  - Hospitals
  - Labs
  - Dental
  - Eyeglasses, hearing aids, etc.
- Can you be claimed as a dependent? Have you been in the country for more than half of the year?
- K1's? (Do you have a business or **partner** in a business?)
  - Entity Type?
- Rental Property?
- Sale of assets or home?