

# FAITHFUL FINANCES ACCOUNTING & TAX

You will need the below documents and information to complete your tax return. Additional documentation may be required for specific situations or tax breaks found throughout our onboarding and preparation. We'll do our absolute best to maximize your return and keep as much money in your household or business as possible.

## **Personal Information**

- Your social security card
- Spouse social security cards
- Driver's Licenses
- Copy of last filed tax return
- Bank routing and account numbers (for direct deposit of refund)

## **Taxpayers with dependents**

- Social security cards of each child dependent
- Childcare records including provider's tax ID and full address on documents
- Income and expenses of any adult dependents including social security payments, etc.
- Form 8332 agreement from non custodial parent (we will provide)
- Fees paid to a licensed day care center or family day care for care of an infant or preschooler
- Wages paid to a baby-sitter for you to work

## **Income Sources**

### **Did you work a job?**

- Form(s) W-2 from each job

### **Did you work as a contractor?**

- 1099-MISC

### **Did you own a business?**

- K-1, Merchant Card and Third Party Network Payments
- Profit and Loss Statement
- Any 1099-MISC for business services

### **Did you receive unemployment or state tax refunds or grants?**

- 1099- G

### **Did you receive retirement income or a distribution?**

- Pension/IRA/annuity income (1099-R)
- Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
- Social security/RRB income (1099-SSA, RRB-1099)

### **Did you own any personal or work savings accounts?**

- Interest income from a financial institution (1099-INT)
- Dividend income from stocks or securities (1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)

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- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Expenses related to your investments
- Record of estimated tax payments made (Form 1040-ES)

## Did you receive any other income or take any losses? Most will be reported on 1099-MISC

- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records (1099-Misc)
- Hobby income and expenses
- Prizes and awards (1099-Misc)
- Royalties from a trusts (1099-Misc)
- Royalty Income (1099-Misc)
- Any other 1099s received
- Record of alimony paid/received with ex-spouse's name and SSN

## **Credits and Deductions**

### Did you own any property?

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
- All other 1098 series forms

### Did you have charitable donations?

- Cash amounts donated to houses of worship, schools, other charitable organizations
- Vehicle donations (1098-C)
- Records of non-cash charitable donations (1098-C)
- Amounts of miles driven for charitable or medical purposes

### Did you have any Medical Expenses?

- Amounts paid for healthcare insurance
- Amounts paid to doctors, dentists, hospitals Health Insurance
- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- Form 1095-B and/or 1095-C if you had insurance coverage through any other source (e.g., an employer, insurance company, or government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)

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## Were you a student? Former or Current

- Forms 1098-T from educational institutions
- Receipts or totals that itemize qualified educational expenses
- Records of any scholarships or fellowships you received
- Form 1098-E if you paid student loan interest

## Were you a teacher for grades K-12?

- Amounts for classroom expenses (for educators in grades K-12) State & Local Taxes

## Did you pay state or local taxes?

- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Invoice showing amount of vehicle sales tax paid

## Did you have put money in an IRA or health savings account?

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions
- All other 5498 series forms (5498-QA, 5498-ETUI SA)

## Were you a part of a Federally Declared Disaster?

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, cleanup costs, etc.)
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information
- You may check FEMA site to see if my county has been declared a federal disaster area