



Help Us, Help You!

Please bring the following items (if applicable) to your scheduled appointment

MISC. ITEMS:

- Valid photo ID
- Bank account and routing number if you would like electronic payment to or from the IRS
- Payment method for tax preparation fees. We accept Cash, debit/credit cards, Paypal, Venmo, and CashApp
- New clients: please bring in your prior year's return— if possible, the last 3 years
- Any notices from the IRS
- Provide Form 1095-A, if health coverage was purchased through the Marketplace (Exchange) during the year
- Health Savings Account info (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)
- Forms related to adopting a child
- Record of debt cancellation
- If you intend to file for a child/dependent-related credit, please provide proof of residence for the child (school records or statement, report card, health care provider statement, medical records, child care provider records, placement agency statement, etc.)

INCOME FORMS:

- Wages, salaries, and tips not reported (Form W-2)
- Unemployment Income (Form 1099-G)
- Scholarships (Form 1098-T)
- Interest/Dividends from checking/savings accounts, bonds, CDs, or brokerage (Forms 1099-INT, 1099-DIV)
- Refund of state/local income taxes (Form 1099-G)

- Alimony income or separate maintenance payments.
- Cash/check/digital assets, or other property or services for any work performed not reported on Forms W-2 or 1099
- Income (or loss) from the sale or exchange of stocks, bonds, cryptocurrency or other digital assets, or real estate (including your home) (Forms 1099-S, 1099-B)
- Disability income (such as payments from insurance, or workers' compensation) (Forms 1099-R, W-2)
- Retirement income or payments from pensions, annuities, and or IRA (Form 1099-R)
- Social Security or Railroad Retirement Benefits (Forms SSA-1099, RRB-1099)
- Income (or loss) from rental property (Please provide a summary of activity)
- Other income (gambling, lottery, prizes, awards, jury duty, digital assets, Sch K-1, royalties, foreign income, etc.)

EXPENSE FORMS:

- Contributions or repayments to a retirement account
- Rent certificate or property tax bill
- College or post-secondary educational expenses for yourself, spouse, or dependents (Form 1098-T)
- Other college or post-secondary expenses (books, supplies, equipment, room & board)
- Student loan interest (Form 1098-E)
- Child or dependent care expenses such as daycare
- For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.
- Capital loss carryover
- Proof of purchase/installation of energy-efficient home items (such as windows, doors, furnace, insulation, etc.)

SELF-EMPLOYED: *INCLUDES CONTRACT EMPLOYEES, GIG WORK, E-BUSINESS, OR ONLINE SELLING (UBER, DOORDASH, AIRBNB, EBAY, ECT.)*

- Self-Employment income (Forms 1099-MISC, 1099-NEC, 1099-K, cash, digital assets, or other property or services)

- Expenses related to self-employment income or any other income you received
(Please provide a summary of activity)
- Inventory information if applicable
- Auto mileage log and odometer reading

Please reach out if you have any questions. You can reach us at (414) 329-1040 or jacksontax@jacksontaxprep.com. We look forward to meeting with you!

