General Taxable Income

- W-2 Form(s) for Wages, Salaries, and Tips
- Interest Income Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
- Sales of Real Estate: Form 1099-S
- State Tax Refunds: Form 1099-G
- Alimony Received or Paid
- Unemployment Compensation Received 1099-G
- Miscellaneous Income: Form 1099-MISC

Retirement Income

- Retirement Income: Form 1099-R
- Social Security Income Form SSA-1099

Business Income

- Business Income and Expenses (Schedule C)
- Rental Income and Expenses (Schedule E)
- Form K-1 Income from Partnerships, Trusts, and S-Corporations (Schedule E p. 2)

Tax Credits

- Child Care Provider Address, I.D. Number and Amounts Paid
- Foreign Taxes paid
- Educational Expenses for You, Spouse, Dependent(s) 1098-T

Itemized Deductions (if total over $24,400 MFJ, $18,350 HOH, $12,200 Single)

- Medical Expenses for the Family (if total over 10% of income)
    - Out of Pocket Medical Insurance Paid (not paid through employer)
    - Prescription Medicines and Drugs
    - Doctor and Dentist Payments
    - Hospital and Nurse Payments
    - Tax Deductible Miles Traveled for Medical Purposes
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if claiming itemized deductions)
- Personal Property Taxes Paid (For CO residents, car registration—make sure the copy given me has OWN tax listed on back)
- Home Mortgage Interest from Form 1098 (Primary or 2nd Residence)
- Charitable Cash Contributions
- FMV of Non-Cash Contributions to Charities (Goodwill, etc)
- Tax Deductible Mileage for Volunteer Purposes

Other Deductions

- IRA Contributions
- Student Loan Interest Paid

Estimated Tax Payments

- Estimated Tax Payments Made
- Last Year's Tax Return Overpayment Applied to This Year

Colorado Specific

- If taking standard deduction, charitable contributions (cash/noncash if total over $500)
- College Invest tuition contributions

General Information

- Copy of Last Year's Tax Return (new clients only)
- Client Information Sheet (new clients only)
- Bank Account Number & Routing Transmit Number (RTN) (For direct deposit/debit purposes)
- Copy driver’s license Taxpayer & Spouse