



Items Needed to Prepare Your Individual Tax Return

- Copy of prior year's federal and state return
- All W-2's
- All 1099-INT's (from investment and bank accounts)
- All 1099-DIV's (from investment accounts)
- All 1099-B's (from investment accounts)
- All 1098's (mortgage interest statements)
- A report on listing of charitable donations
- Amount of personal property tax paid (Virginia residents)
- All 1099's Miscellaneous
- Date of birth for yourself, spouse and all dependents
- Social Security Numbers (SSN) for yourself, spouse and all dependents
- Rental income and rental property expenses (if applicable) sales price and cost basis for any stocks or mutual funds sold (if applicable)
- Name, address, SSN/EIN and amount paid to each day care provider (if applicable).
- Amount of long term care insurance paid (if applicable)
- Listing of medical expenses (Note: Medical expenses must be more than 7.5% of your income before anything can be deducted)
- Amounts invested in college savings accounts (if applicable)
- All 1099-R's
- Social Security Statements showing benefits Recorded
- Settlement sheets related to purchase, sale and/or refinance real estate
- All year end investment account statements for retirement and non-retirement accounts
- Receipts related to energy efficient improvements (does not include appliances)