

**Please BRING this paper with you to your appointment**



8903 W. Sunset  
Wonder Lake, IL 60097  
(815) 728-1996

**INCOME & Expenses:**

If you do not understand or are not sure if something applies to you, PLEASE bring this with you and we will review this together. ☺ Pixie

**DOCUMENTS REQUIRED:**

1. If NEW CLIENT bring copies of past 3 years of returns. Also bring Legal Photo ID and Social Security Cards.
2. If NEW CLIENT, also bring dependents Birth Certificates, Social Security Card.
3. IMPT: bring 1099-K's and information; Bring Virtual Currency documents!!

**THIS YEAR MORE IRS required documents for when dependent children are on tax return!!**

1. Social Security Card, Birth Certificate, Driver's License (if driving). *(If already on file with us, omit)*
2. If under 18, documentation from School showing Child's residence and residential parents: school registration for online classes is acceptable for Spring and Fall 2024. Home school registration is acceptable.
3. If Pre-School Age, then day care document, doctor's bills showing custodial parent address and child's address is the same or any document showing they were home with you as you worked from home (if possible).
4. If dependent is 19 – 24 years and full-time student: for Education Credit MUST have Form 1098-T and account transcript from college showing *entire account of charges and payments with DATES*. (Remember include Book Receipts for deduction.) Also Scholarship information.
5. If you are Head of Household you must bring documents to prove you supported children and children are with you. (Utility bills, Lease with children's names, etc.) PLEASE CALL FOR MORE INFORMATION.

**Forms and Documents (Income & more)**

- W-2 \_\_\_\_; 1099-R \_\_\_\_ (if Rollover, bring proof of Rollover; **Also bring end of year statements for all Retirement Accounts**); SSA-1099(Social Security) \_\_\_\_; RRB-1099 or Other Retirement Annuity \_\_\_\_
- Medical Related: Form **1095-A ONLY**; Also Form 1099-SA (HSA Medical) & Form 5498-SA (HSA, MSA)
- W-2G\_\_(Gambling: bring proof of losses per type of bet per day); **1099-G (Unemployment Income Statement \_\_\_\_ & 1099-G State Tax Refund** (from all years if proceeds received\_\_\_\_ 1099-INT \_\_\_\_ 1099-DIV\_\_\_\_; Municipal Bond Interest \_\_\_\_; **Bring ALL documents from Broker end of year and tax statement**; 1099-B & sales of stocks, bonds\_\_\_\_(number of statements attached); **Attach all stock sale** transaction information. 1099-S (real estate sale) attach all escrow statements & initial costs)\_\_\_\_
- Forms 1099-Misc & 1099-NEC. \_\_\_\_\_(number of forms); \_\_\_\_ 1099-K \_\_\_\_ 1099-A (abandonment/foreclosure) & ALL 1099-C\_\_\_\_
- Schedule K—1 \_\_\_\_\_ (Partnerships, S-Corporations, Trust or Estate Income)
- **ALL information about any funds or ownership you have in any Foreign Account\*!!!!**
- Alimony Received \_\_\_\_ Or Alimony Paid \_\_\_\_ to (Name of receiver of alimony)\_\_\_\_ & (Social Security Number AND copy of divorce decree.)- Unless we already have on file.
- Form 1099-Q
- Roth & IRA contributions
- Jury Duty\_\_\_\_; Unreported Tips\_\_\_\_; Disability Income \_\_\_\_; Any other Income from Bartering or Hobby \_\_\_\_; Elections Worker \_\_\_\_; 1099-K & 1099-NEC & 1099-Misc\_\_\_\_.
- ILLINOIS K-12 bring registration sheets showing costs for Private or Public schools all fees paid for tuition, lab fees, Driver's Ed, book fees, book rental and any field trip receipts. (Homeschoolers bring actual receipts)!!!!
- Settlement Statements: New Home or Refi of Home