

TAX DOCUMENTS GENERAL DOCUMENTS TO PROVIDE:

- Annual Engagement letter
- Annual Client Info/Drop-off Form
 - W-2 for wages
 - W-2G for gambling
 - 1099-Int for interest
 - 1099-DIV for dividends
 - 1099-B Brokerage
- 1099-K Payment Card and Third Party Network Transactions
 - SSA-1099 Social Security
 - 1099-NEC for income
 - 1099-Misc for income
 - 1099-K for income
 - 1099-Interest for mortgages
 - 1098-T for tuition
 - 1099-SA for HSA's
 - 1099-R for retirement
 - 1099-G for refunds & unemployment
 - Form 5498 for IRA values
 - IRA and Roth IRA contributions for 2021
 - K-1 income from S corporations or partnerships
- Alimony paid or received and date of divorce agreement
- Charitable donations-total amounts and recipients (cash and noncash)
 - 529 Education Contributions
 - Estimated tax payments and dates
 - Property tax statements
 - Certificates of rent paid
- Childcare costs, include name, address, and ID # of the recipient
 - Copy of Driver's License(s)
- Closing paperwork for sale, purchase, or refinance of home

Each year taxpayers receive letters from the IRS informing them that their tax return has been adjusted because the wrong amount for "estimated tax payments" was used. If you paid estimated taxes and are not 100% sure of the amount, please verify your deposits by visiting the IRS website (<https://www.irs.gov/payments/your-online-account>) or calling 1-800-829-1040 (IRS) and 651-296-3781 (MN).