



WHAT TO BRING TO YOUR TAX APPOINTMENT

Coming into the office, or contactless filing with us this year, here is a detailed list of items that are essential to completing your tax return. Remember, all tax files are not created equal, so if it doesn't apply...let it fly!

Give us a call at 804-745-6324 to schedule your appointment today, or feel free to stop by the office and drop off your documents, 7005 Hull Street Road Richmond, VA 23224

Visit www.reliabletaxva.com to learn more about our services, rates, & reliable service.

PERSONAL INFORMATION

- Taxpayer's drivers license or other federal ID with photo
- Taxpayer's social security card with your number or tax ID number
- Spouse's full name and social security number or tax ID number
- Spouse's driver's license or other federal ID with photo

DEPENDENT(S) INFORMATION

- Full name and Date of Birth
- Social security number(s) or tax ID number(s) (this is only required your first year filing with us or if this is a new born child)
- Childcare records (including the providers social security number or tax ID number)
- Income of other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if it doesn't apply....let it fly!)

INCOME SOURCES

Employed

- W-2 (last paystubs are not accepted)

Unemployed

- 1099-G

Self Employed



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- 1099- Misc or 1099-NEC, Schedule K-1, income records to verify amounts not reported on 1099 (see our self employment worksheet for more information)
- Record of all expense totals (receipts and ledgers are not needed)
- In Home Office information

Rental Income

- Record of income and expenses

Retirement Income

- 1099-R
- 1099-SSA, RRB-1099
- Traditional IRA contributions that were already taxed

Savings & Investments or Dividends

- 1099-INT, 1099-OID, 1099-DIV
- 1099-B, 1099-S
- Crypto currency transactional information
- 1099-SA (distributions and/or contributions)

Other Income & Losses

- W2-G (Lottery or Gambling income/losses)
- Any additional income received in the current tax year

DEDUCTIONS

Real Estate/Home Ownership

- Form 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy saving home improvements
- First time home buyer credit repayment form



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Charitable Donations

- Cash donation amounts contributed to house of worship, schools and/or other charitable organization
- Non cash donation records/receipts
- Mileage driven for medical or charitable purpose

Medical Expenses

- Amounts paid for healthcare insurance and to doctors, dentists, hospitals not covered by health insurance

Health Insurance

- Form 1095-A (Marketplace Insurance Plan)
- Form 1095-B, 1095-C (Insurance through any other source other than the Marketplace)
- Marketplace exemption certificate (if you applied for and received an exemption from the Marketplace)

Child Care Expenses

- Fees paid to licensed day care center or family day care for infant or preschoolers
- Wages paid to a babysitter (exclude any monies paid through an employer flex spending account)

Educational Expenses

- 1098-T from educational institution
- 1098-E (student loan interest)
- Record of qualifying expenses paid
- Record of scholarships or fellowships received

Job Expenses & Tax Prep Fees

- Employment related mileage
- Unreimbursed expenses
- Amount paid for tax preparation last year



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State 7 Local Taxes or Sales Tax

- Last year State Refund Amount
- Personal Property Tax amount paid for vehicle

Prior Year Tax Returns

- Last years Federal and State tax return (new clients only)