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Financial Services LLC

Leading You To Personal Financial Success

List of Tax Preparation Forms, Documents

[Taxable Income Forms, Documents](#)

- ___ [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
- ___ Miscellaneous Income: [Form 1099-MISC](#)
- ___ [Retirement Income](#): [Form 1099-R](#)
- ___ [Social Security Income](#) and Railroad Retirement Income: Form SSA-1099
- ___ [Business Income](#) and Expenses
- ___ Rental Income and Expenses
- ___ Farm Income and Expenses
- ___ Form K-1 Income from Partnerships, Trusts, and S-Corporations
- ___ [Tax Deductible Miles Traveled](#) for Business Purposes

[Tax Credits](#)

- ___ Child Care Provider Address, I.D. Number and Amounts Paid for the [Child and Dependent Care Credit](#)
- ___ [Adoption](#) Expense Information for the Adoption Credit
- ___ [Foreign Taxes](#) paid
- ___ [First Time Home Buyer Tax Credit](#)

[Tax Deductions, Expenses](#)

- ___ [Medical Expenses](#) for the Family
- ___ Medical Insurance Paid
- ___ Prescription Medicines and Drugs
- ___ Doctor and Dentist Payments
- ___ Hospital and Nurse Payments
- ___ [Tax Deductible Miles Traveled](#) for Medical Purposes
- ___ [Home Mortgage Interest](#) from Form 1098
- ___ Home Second [Mortgage Interest Paid](#)
- ___ Real Estate Taxes Paid
- ___ State Taxes Paid with Last Year's Return (if claiming [itemized deductions](#))
- ___ Personal Property Taxes Paid
- ___ [Charitable Cash Contributions](#)
- ___ Fair Market Value of Non-cash Contributions to Charities
- ___ Unreimbursed Expenses Related to Volunteer Work
- ___ [Tax Deductible Mileage](#) for Volunteer Purposes
- ___ Casualty and Theft Losses
- ___ Amount Paid to Professional Preparer Last Year
- ___ Unreimbursed Expenses Related to Your Job
- ___ [Miles Traveled Related to Your Job](#)
- ___ [Union and Professional Dues](#)
- ___ [Investment Expenses](#)
- ___ [Job-hunting Expenses](#)
- ___ [IRA Contributions](#)
- ___ [Student Loan Interest Paid](#)
- ___ [Moving Expenses](#)
- ___ Last Year's Tax Return Preparation Fee

Tax Estimate Payments

- ___ [Estimated Tax Payments](#) Made with ES Vouchers
- ___ Last Year's Tax Return Overpayment Applied to This Year

General Information

- ___ [Copy of Last Year's Tax Return](#) - New 1st Year Clients Only
- ___ Copies of Social Security Number Cards for You, Your Spouse, Dependents
- ___ [Educational Expenses](#) for You and Your Spouse
- ___ Dependents' Names, Years of Birth, and Social Security Numbers
- ___ Dependents' Post High School Educational Expenses
- ___ [Child Care Expenses](#) for Each Dependent
- ___ Routing Transmit Number (RTN) (For direct deposit/debit purposes)

- ____ Bank Account Number (BAN) (For direct deposit/debit purposes)

Send an email to contact@jcfinancialservllc.com or a secure message through our client portal if you have any questions and need a more in depth review of what you need to send us