

# What do you need for your Tax Preparation

## INCOME

<b>Personal information</b>	<ul style="list-style-type: none"><li>• Social Security numbers from you and/or your Spouse</li><li>• Date of Birth of you and /or your Spouse</li><li>• Current Address</li><li>• Telephone number</li><li>• Banking Account information: Route # and Bank account number</li><li>• Current E-mail address</li></ul>
<b>Dependents Information</b>	<ul style="list-style-type: none"><li>• Name as is shown on his/her Social Security cards</li><li>• Social Security Number</li><li>• Date of Birth of all of them</li></ul>
<b>For Salary Income and others income</b>	<ul style="list-style-type: none"><li>• W_2 form provided by the employer to you, and/ or your Spouse</li><li>• 1099-G Unemployment Form</li><li>• W-2G for Winning Income</li><li>• 1099SS Social Security Income</li></ul>
<b>Business Income</b>	<ul style="list-style-type: none"><li>• 1099-Misc Income for you kind of business provided to you and/ or your spouse</li><li>• 1099-K provided to you if the income was received by any Merchant</li></ul>
<b>Investment Income</b>	<ul style="list-style-type: none"><li>• 1098-B for the sale of stocks or another investments</li><li>• Statement from Bank if you received any interest income.</li></ul>

## DEDUCTIONS

<b>Mortgage Expenses</b>	<ul style="list-style-type: none"><li>• 1098A form for Interests paid to the lender during the year</li><li>• Real Estate Taxes paid to the taxing authority</li><li>• Other property taxes</li></ul>
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<b>Medical Expenses</b>	<ul style="list-style-type: none"> <li>• Detail of those medical expenses for you and/ or your spouse and your dependents; detail of equipment and additions to your house needed authorized by your doctor.</li> </ul>
<b>Donations</b>	<ul style="list-style-type: none"> <li>• Authorized donations (Cash or items )to institutions as a charities or donated items</li> </ul>
<b>Employee Business Expenses</b>	<ul style="list-style-type: none"> <li>• Detail of those expenses, if you are filing taxes on those States that is required to file the Income Taxes like California,</li> </ul>
<b>Tuition information</b>	<ul style="list-style-type: none"> <li>• 1098-T provide by the School Institution to you, your spouse or your dependents</li> <li>• 1098- E for Student Loan Interest paid by you, your spouse or your dependents</li> </ul>
<b>Moving Expenses</b>	<ul style="list-style-type: none"> <li>• Detail of expenses for moving to another location if you are a military</li> </ul>
<b>Business Expenses</b>	<ul style="list-style-type: none"> <li>• Detail of all those expenses that were caused because your business : Advertising, office expenses, materials, supplies, and other expenses.</li> <li>• Assets that were bought during the year and those from previous years</li> <li>• Vehicle expenses: If you spent in all those items needed for your vehicle</li> <li>• Detail of the total miles used for you vehicle in the business activities</li> </ul>
<b>Child Care Expenses</b>	<ul style="list-style-type: none"> <li>• Expenses paid during the year to the Day Care Institution for your dependents (Children and parents): Amount paid, Institution Name, Tax Id number and the address</li> </ul>
<b>Adoption Expenses</b>	<ul style="list-style-type: none"> <li>• Detail of those required expenses made for the adoption for those qualified dependents</li> </ul>