



## WHAT TO GATHER FOR YOUR TAX APPOINTMENT

### REQUIRED DOCUMENTS FOR NEW CLIENTS:

- Driver's License(s) or another photo ID
- Social Security Card(s)
- Dependents Social Security Numbers & Dates of Birth
- Last Three (3) Years' Tax Returns
- Completed and Signed – Client Information Worksheet and Questionnaire  
\*copy included in welcome email or available on our website <https://www.uharttax.com/quick-links/worksheets--important-documents>
- Form 1095-A if you had medical insurance through Covered California

### REQUIRED DOCUMENTS FOR EXISTING CLIENTS:

- Driver's License(s) or another photo ID (if expired or if we don't have it, including spouse)
- Completed and Signed – Client Information Worksheet and Questionnaire
- Form 1095-A if you had medical insurance through Covered California

### TAX DOCUMENTS/INFORMATION NEEDED:

- **INCOME:**
  - Wages (Form W-2)
  - Retirement Income, Pension, IRA (Form 1099-R)
  - Social Security Income (Form 1099-SSA)
  - Unemployment/Paid Family Leave/State Tax Refund (Form 1099-G)
  - Self-Employment Income (Form 1099-Misc & K-1)
  - Interest Income (Form 1099-INT) & Dividend Income (Form 1099-DIV)
  - Royalties (Form 1099-Misc)
  - Home Sale (Form 1099S AND the FINAL CLOSING STATEMENT) even if you think you don't have to report this, you do!
- **DEPENDENT INFORMATION:**
  - Childcare Expenses (provider's name, tax ID number, address, phone # and amount paid)
  - Educational Expenses (Form 1098-T, Proof of Payment and List of expenses)
  - Student Loan Interest (Form 1098-E)
  - Dependent's Driver's License or Photo ID (non-expired) if they are filing a return too
- **STOCK SALES, INVESTMENTS & SAVINGS:**
  - Sales of stock or bonds (Form 1099-B)
  - Dates of acquisition, number of shares & cost basis
  - IRA/ROTH IRA Year-end statements (12/31/xx statement and Form 5498s)
  - Commissions
  - HSA Reimbursements (Form 1099-SA) & Contributions (Form 5498-SA)
  - Crypto Currency - 1099-B for all crypto accounts and a transaction summary for the entire tax year. If you receive any rewards, incentives, etc., those items may need to be included as income. Some times the companies will send out a form 1099-Misc for these items as well (usually if over \$600).

- **ITEMIZED DEDUCTIONS:**
  - Mortgage Interest Paid (Form 1098)
  - Real Estate Tax (including supplemental payments)
  - DMV Registration Renewal Notice (or last 5 of VIN and license plate number)
  - Final Closing Statement from Purchase, Sale or Refinance of Property
  - Cash & Non-Cash Charitable Donations
  - Job-Related Educational Expenses or Other Job-Related Unreimbursed Expenses
  - Medical, Dental, Prescriptions, Insurance Expenses (Form 1095 for Covered California)
  - Long Term Care Premiums paid
- **SELF EMPLOYED (including UBER and LYFT):**
  - Profit and Loss Statement from Bookkeeping System
  - Income/Expenses – Listed by Type (additional records may be requested)
  - Business-Use Asset Information (cost, date placed in service, etc.)
  - Home Office Information (if any, see Home Office Worksheet on website)
  - Record of Estimated Tax Payments (1040-ES)
  - Vehicle Use Information (if any, see Vehicle Worksheet on website)
- **RENTALS:**
  - Profit and Loss Statement from Bookkeeping System
  - Income/Expenses – Listed by Unit then Type (additional records may be requested)
  - Rental Asset Information (cost, date placed in service, etc.)
  - Record of Estimated Tax Payments (1040-ES)
  - Vehicle Use Information (if any, see Vehicle Worksheet on website)
- **MISC INCOME & EXPENSES:**
  - Gambling Income (Form W-2G) & Losses (Win Loss Statements and Logs) (you can contact the Casino and request copies of ALL W-2gs and Win Loss Stmts)
  - Estimated Quarterly Taxes (Form 1040-ES)
  - Personal Residence Foreclosure/Abandonment (Form 1099-A or 1099-C)
  - List of Capital Improvements to Real Property if Sold
- **MILITARY**– please bring your year-end LES

Please bring any other information you feel might be needed for the tax return preparation and please feel free to ask us questions before, during and after your appointment!

VISIT : [www.uharttax.com](http://www.uharttax.com) for additional worksheets (such as charitable donations and occupational deduction worksheets as well as more important tax information).

