



WAGE & EARNINGS STATEMENTS

- All W-2, 1099, & Schedule K-1 Forms
- Savings & Interest & Dividend Statements
- Rental Income & Expenses
- Social Security, Pension, IRA, State Income Tax Refund
- Unemployment Compensation Forms
- Lottery & Gambling Winnings & Losses
- Hobby Income & Expenses
- Prizes & Awards
- Healthcare Reimbursements

PERSONAL & DEPENDENT INFORMATION

- Current Address
- Social Security or ITIN Numbers for Anyone That Will Be Included on Your Tax Return
- Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS
- All Birth Dates for Anyone Being Included on Your Tax Return
- Childcare Payment Records Along with Licensed Provider's EIN & Address
- Income of Other Adults in Home
- Any Alimony Payments Made Along with Ex-Spouse's SSN

EXPENSES

- All 1098 Forms & Any Other Mortgage Interest Statements
- Real Estate & Personal Property Taxes Paid
- Amount of State & local Taxes Paid (Not Including Wage Withholdings)
- Health Expenses (must meet minimum of 7.5% of AGI)
- Invoices of Vehicle State Sales Taxes Paid
- Charitable Donation Records (Cash & Non-Cash)
- Tuition & Education Fees & Student Loan Interest Paid
- Mileage Records & Expenses for Charity Work
- Federal & State Estimated Taxes & Any Foreign Taxes Paid
- Qualified Energy Efficient Home Improvement Purchases

Franklin & Company CPAs

BUSINESS EXPENSE RECORDS

- Mileage
- Meals & Lodging Expenses
- Business Rent's Paid Along with Landlord's Name & Address
- Travel Expenses
- Educator Expenses Paid
- Parking & Toll Amounts
- Home Office Information

HEALTHCARE

- Any & All 1095 Forms Through the State or Federal Exchange
- Marketplace Exemption Certificate (ECN)

FEDERALLY DECLARED DISASTER

- Records of Property Loss
- Records of Building/Repair Costs
- Insurance Reimbursements/ Claims to Be Paid
- FEMA Assistance Information
- City/County Lived/Worked/Had Property In

BANK INFORMATION

- Checking Account Number and Routing Number for Direct Deposit

PREVIOUS YEAR'S TAX RETURN

- Only Needed If You Are A New Client