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**Tax Documents Needed from Clients:**

New Clients:

Prior Year Tax Return

Driver’s License for each taxpayer (e.g. husband and wife)

Social Security cards for children

Standard Documents

W2’s

1099’s

Bank Interest Statements

Investments Statements

Form 1095-proof of health insurance

HSA Statements

Homeowners:

Property Tax Bill

Mortgage Interest Statements

Settlement Statements for purchase or sale of real estate

Self-Employed:

Copy of QB File if available or

Spreadsheet of Sales and Expenses or

Financial Statements