

DOCUMENTS NEED TO BRING:

Here is the list of documents need to bring to file and process the tax return, please bring those which are applicable for you and spouse (if married)

INCOME:

- **W2**: Salaries and wages: All W2 issued by your employer to you and spouse
- **1099 INT or 1099 DIV** : Interest / Dividend Income:
Accounts in the USA: Form 1099INT and form 1099DIV
Foreign Accounts: Taxpayers who having aggregate value of all foreign accounts is \$10,000 or more at any time during the year, must have to report the interest or dividend income in schedule B & later also have to file form "TD F 90-22.1 (due in June 30th of each year) as disclosure . (If over \$50,000) then form 8939 with return.
- Alimony received: Amount of alimony received, if any
- **1099MISC**: Business Income: Form 1099MISC or if a self employed make sure bring a list of income received and list of all the relevant expenses incurred and paid to perform that business - please refer our questioner for schedule C
- **1099 Brokers**: Stock Detail: Capital Gains/(Loss) on sale of Stocks/options, real estate, sale of business property, bad debts and other capital assets.
- **1099R – IRA** or 401k distribution and pension or annuities receipts
- **Schedule K/K-1 and 1099MISC**: for profit or (loss) from S corporation/ Partnership and for rent or royalty income received.
- **1099G** : Unemployment compensation & for taxable refunds, received from states
- **1099 SA** : Social security benefits
- Other Income: Gambling or lottery winnings **W2G**, awards/prizes, other income

Adjustments/Deductions :

- **8889 HSA** – Health saving account deduction
- Alimony Paid – Need the recipient name & SSN
- **1098E** – Student loan interest – mostly received if paid more than \$600.
- **1098T** – Tuition fee paid for higher education
- Foreign Tax Credit – Need proper evidence for taxes paid in foreign country for the same income taxed in the USA
- Dependent Care expenses – Must bring day care name, address & tax ID info
You can claim this only if both taxpayer working or one of them is a student.
- **1098** – Mortgage interest paid, PMI paid, Real estate taxes paid or confirmation letter from bank or private lender for receipt of mortgage interest over the year.
- **HUD-1** statement for claiming points or first time home buyer credit

Questionnaire :

All taxpayers must have to fill out basic information questioner and following if :

- Claiming itemized deductions : Schedule A questioner
- Have business or self-employed income – 1099MISC – Schedule C questioner
- Have rental Income – received or not 1099MISC - Schedule E questioner

Signatures required:

All taxpayer (s) must have to sign relevant questionnaire, disclosure statement & form 8879.