Real Estate & Tax Solutions
realestateandtaxsolutions.com

Every taxpayer's situation is unique, and thus it is impossible to list all the items one must bring in for a tax appointment for every type of tax situation. When in doubt, bring the item in question to your tax appointment. The following is a good general list of the items to bring in with you for your scheduled tax appointment:

Prior Year Tax Return Copies

If you are a new client, please bring copies of your last 3 years federal and state income tax returns. We will review them for FREE, and we may be able to amend mistakes/omissions getting you back additional refunds.

Personal & Dependent Information

- Social Security or ITIN Numbers with date of births for anyone who'll be on your tax return
- Childcare payment records with licensed provider's ID number(s)
- Amount of any alimony payments with ex-spouse SSN (for divorces pre-December 31, 20180)

Income Statements

- Bring any & all W-2, 1098, 1099 & schedule K-1 forms
- Purchase date & total investment for any stocks or property sold
- List of investment related expenses
- Education scholarships or fellowships

Educator Expenses

If you are a teacher, please list your expenses up to $250.

Head of Household documentation

If your filing status is Head of Household (you support someone else) please bring some mail (preferably from school or health care) addressed to your dependent at your address.

Itemized Deductions

If you are planning on itemizing your deductions (Schedule A) please compose a spreadsheet/list summarizing them. Itemized deductions include:

- Mortgage interest (up to $750,000 in new acquisition debt on a primary or secondary home for loans after Dec.14, 2017. Older loans have a $1 million cap. Write offs for home equity loans used for non-home expenses or purchases are no longer deductible.)
- Real estate (up to $10,000), sales (big purchases) & personal property tax records
- Casualty & theft losses
- Amounts of state & local income tax paid in prior years
- Records of cash donations to religious institutions, schools & other charities
- Records on non-cash charitable donations

Retirement & Education

- Records of any contributions to IRAs, HSAs & other retirement plans

- Records of tuition and other higher education expenses (books, computers, etc)

Health Care

Form 1095-A if you received health insurance from an Exchange (State or Federal)

- Marketplace exemption certificate if you applied for and received an exemption from the Exchange

Stocks & Mutual Funds

If you sold stocks or mutual funds, please provide a spreadsheet/list showing:

- The date(s) you purchased each item(s) sold
- Total purchase price of each item sold. *Do not assume your cost information is provided on Form 1099.*

Self-Employment

Please prepare a simple list or spreadsheet which summarizes your:

- Gross self employment income for the tax year and your applicable expenses categorized and summarized by the type of expense (i.e. advertising, equipment, supplies, etc). No need to show us all your receipts, but be sure to keep them for three years in case the IRS checks.

Rental Property

If you received income from rental property (Schedule E), please prepare a simple 1 page income statement showing:

- Gross rental income you received during the tax year
- Your applicable expenses categorized and summarized by the type of expense (i.e. advertising, mortgage interest, real estate taxes, repairs, maintenance, condo fees, etc).

- Rental start date and original cost base for all properties

Business Use of Home

If you used a portion of your home for business use, please provide:

- Square footage calculation of the area used for business
- The date you began using the space for business
- Original purchase price paid for the property
- Summary of your utility expenses (gas, electric, oil, condo fees, landscaping, snowplowing, maintenance, etc)
- Major home improvements and direct office expenses (repairs, business phone, etc).

Residential Energy Efficient Improvements

Please provide the cost of the following applicable items:

- High-efficiency heating & cooling systems, water heaters, windows, doors, insulation, qualified solar electric property, solar water heating property, fuel cell property, small wind energy property and geothermal heat pump property

Foreign Nationals on a F-1 or J-1 Visas

Please bring your Visa and passport and summarize the following information:

- Your permanent address where you are a citizen
- Your F-1 / J-1 VISA number
- The actual dates entered / left the United States for corresponding tax year

- The number of days you were in the United States for the previous **three** tax years

Foreign Income and Assets

Be sure to tell us about all the income you earn or receive, including income from other countries.

Estimated Tax Payments

If you made any estimated tax payments this tax year, we will need to know the dates and amounts paid of all federal and state estimated tax payments.

Business Rents Paid

Please summarize the rent you paid for business purposes during the tax year and your landlord's name and address.