nca
nile clark
& associates

Tax Preparation • Accounting Services • Year Round Assistance

What do I need to bring?

- A copy of your most recently filed tax return – for **NEW CLIENTS ONLY**
- Name, birthdates and social security numbers for any new dependents
- All income reporting statements including wages (W2s), retirements (1099Rs), unemployment compensation (1099G), self employment income (1099NECs), social security income (1099SAs).
- Interest and dividend income statements from banks, credit unions, etc. (1099INT, 1099DIV if over $10)
- Stock transactions for all sales made during the year (1099Bs) along with original purchase dates and costs
- IRA or SEP contributions or distributions
- Interest paid on student loans (form 1098)
- HSA or MSA contributions or distributions
- Amounts paid during the year for medical expenses, including premiums that are NOT pretaxed, doctors, hospitals, dental, optical, prescriptions, travel/mileage for medical, supplies, etc.
- Mortgage interest paid (form 1098)
- Real estate taxes paid
- Cash and noncash contribution amounts and mileage for volunteer work
- College tuition and books paid for with funds other than scholarships or grants (form 1098T)
- Amounts paid for childcare along with providers name, address and social security or employer identification number
- Health insurance coverage information ONLY if provided through the health insurance marketplace, i.e. Your Health Idaho (Form 1095A)
- Amounts received from IRS for 3rd stimulus payment ($1400 per person)
- Any amounts received from IRS for Advanced Child Tax Credit
- Business information for self employed individuals only. See Schedule C, F and E worksheets
- All payments made to the IRS or State Tax Commission during the year
- Any correspondence received from any taxing authority during the year
- List of any questions that you may have for your tax preparer

836 La Cassia • Boise, Idaho 83705 • p: (208) 383-1186 • f: (208) 383-1183
www.nileclarkandassociates.com