

## What do I need to bring?

- Copy of your most recently filed tax return – for **NEW CLIENTS ONLY**
- Names, 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 benefits (1099SAs), Gambling winnings (W2G)
- Statement from employers noting tip and overtime income – for 2025 only. 2026 will be reported on W2s.
- Interest and dividend income statements from bank, 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 if not reported on 1099B
- IRA or SEP contributions or distributions
- Interest paid on Student Loans (1098)
- HSA or MSA contributions or distributions
- Pass through income from partnerships, S-corps, estates or trusts (K-1s)
- Amounts paid during the year for medical expenses, including premiums that are NOT pretaxed: doctors, hospitals, dental, optical, prescriptions, travel/mileage for medical, supplies, nursing home or in-home care, etc.
- Mortgage interest paid (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 (1098T)
- Expenses paid for non public schools and approval information from Idaho Parental Choice
- 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 (1095A)
- Business information for self employed individuals only. See Schedule C, F and E worksheets
- Interest paid on qualified new vehicle purchases along with VIN
- 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 preparer