

Tax Preparation Checklist:

To ensure proper preparation of your return please include originals** or copies of all the following applicable documents:

- W2s
- Bank Interest ~1099-INT
- Other Income~1099-B, 1099-MISC, 1099-NEC, 1099-K, 1099-R, 1099-G, K-1
- Dividend Income~1099-DIV
- Rental Income and any expenses pertaining to property
- Business Income and any expenses
- Social Security Income
- Student Loan Interest~1098-E
- Tuition~1098-T
- Health Savings Account, HSA, if so, please include balance on account as of 12/31
- Mortgage Interest-1098
- Real Estate Taxes
- Union Dues
- Employee Business Expenses (unreimbursed)
- Statement for E-Z Pass
- Fees for MBTA Passes
- Childcare Expenses
- Health Insurance Coverage~1099-HC, 1095-A, 1095-B, 1095-C
- If you made a one time or quarterly payment(s), please include a copy of voucher and check or email confirmation of payment.

Upon further review of your return additional documents may be requested.

**All originals will be returned to you along with your return.