

Scott E Lynch CPA

Items to look for when providing paperwork (when applicable):

_____ **COPY OF DRIVERS LICENSE - TAXPAYER AND SPOUSE**

_____ **SIGNED ENGAGEMENT LETTER**

_____ W-2s (wages, salaries and tips)

_____ Letter 6519 (notice of advanced child tax credit payments)

_____ 1095-A (health insurance marketplace statement)

_____ 1099-HC (massachusetts health care coverage)

_____ 1098-E (student loan interest paid)

_____ 1098-T (tuition statement)

_____ 1099-G (unemployment benefits)

_____ 1099-NEC (self-employment)

_____ 1099-MISC (rental, royalty, other income)

_____ 1099-SSA (social security benefits)

_____ 1099-Int (interest earned)*

_____ 1099-Div (dividends earned)*

_____ 1099-B (proceeds from sale of stocks, mutual funds etc)*

_____ **(consolidated form-1099 from investment firm will include each of these forms.)*

_____ 1099-R (retirement distributions)

_____ K-1s (partnerships, s-corps, trusts, estates etc)

_____ Tax notices sent from IRS or other taxing agency

_____ Medical Expenses (itemized)

_____ Property Taxes (real estate, personal property)

_____ 1098 (mortgage interest statement)

_____ Rental Property Income (listed per property)

_____ Rental Property Expenses (listed per property)

_____ Contributions (cash and non-cash)

_____ Child and Dependent Care Expenses (amount paid per child, name, address and ein of provider)

_____ Business Income and Expenses for Self-Employment

_____ Total Mileage (business use for self-employed)

_____ Total Mileage (personal use for self-employed)

_____ Estimated Tax Payments (amounts and dates paid)

_____ 5498 IRA Contributions (roth and/or traditional)

_____ Settlement Statement HUD-1 (purchase / sale of real estate)

_____ **PRIOR YEAR TAX RETURN if not prepared by Scott E Lynch CPA**