

The following list contains the most common information needed for return preparations.

- Form 1095-A from the Health Insurance Marketplace if applicable.
- Form 1095-B or Form 1095-C detailing health insurance coverage.
- Banking information and balances on Foreign Bank Accounts and Foreign Assets
- Sales tax paid on motor vehicle, aircraft, boat or home building supplies.
- Birth certificate or Driver's License for those who turned 65 in 2016.
- Proof of disability for those claiming to be disabled for the 1st time in 2016.
- Your e-mail address.
- Amount of New Jersey Property Tax Reimbursement and/or Homestead Benefit Amount.
- W2's, 1099R's 1099INT's, 1099DIV's, 1099MISC's, 1099S's, 1098's, 1099SA's, etc.
- Unemployment compensation (1099-G) –**must be obtained on-line through your account.**
- Final paystubs from each employer.
- Social Security Benefits. Gross amount received. (1099-SSA)
- Gambling winnings and losses to the extent of winnings. W-2Gs
- Alimony (paid or received) Name and Social Security number of recipient or payee.
- Teachers' (K-12) – Classroom expenses
- Business Income-Schedule C
 - Total Receipts
 - Expenses Itemized by Type
 - Cost, type and date of new equipment purchased
 - Vehicle Mileage:1)Total Mileage 2)Business Mileage on all vehicles used for business.
 - Vehicle operating expenses; gas, repairs, insurance; maintenance; interest
 - New business vehicles: Type and date put into service and cost
 - Interest Paid on Business Loans
- Gains and Losses from Sale of Stock /Property – Schedule D
 - Net Proceeds and Date Sold (1099-B)
 - Original Purchase Price and Date Purchased
 - For Stocks and Mutual Funds; The Amount of Reinvested Dividends
 - For Real Estate; Capital Improvements
- Rental, Royalty Income- Schedule E
 - Rental income received per property.
 - Total expenses per property by expense category, ie: repairs, supplies, insurance
 - Capital Improvements – Date of purchase, description and cost.
- K-1s from Partnerships, Estates, Trusts or S Corporations.
- Individual Retirement Accounts (IRA) – contributions, distributions and conversions to Roth IRAs.
- Total unreimbursed medical expenses including health insurance, prescriptions, dental, vision, long term care insurance, weight loss program costs and miles traveled to obtain medical care.
- Real Estate Taxes on all Properties Owned
- Home mortgage interest including interest on home equity loans and points
- Margin/Investment interest
- Cash contributions and/or In Kind Contributions (details and receipts for In-Kind contributions).
- Miscellaneous Itemized Deductions
 - Safe Deposit Fee, Union Dues, Uniforms, Safety Equipment, IRA Fees
 - Tax Preparation Fee, Employee Business Expenses, Investment Expenses
- Dependant Care Expenses, Name, Address and SSN or Tax ID of Caretaker
- Estimated Tax Payments to the IRS and the State. **Date and amount of each payment.**
- Name, Social Security Number and Birthdate of new dependants
- Interest paid on Education loans
- College Tuition Payments. Student's year of college. Form 1098-T and payment history from the college. **Make sure 1098-T shows amount paid.**
- College books and supplies(including computers) for full-time students in a 4 year program.
- Closing statements for purchase or sale of Real Estate