

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

- NJ Veterans – Bring Discharge Papers to First Appt to Submit for \$3,000 Exemption

- 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 2017.

-Proof of disability for those claiming to be disabled for the 1st time in 2017.

-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 semester receipts.

-College books and supplies(including computers) for full-time students in a 4 year program.

-Closing statements for purchase or sale of Real Estate