

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

- **NJ Veterans newly retired or discharged – discharge paperwork to apply for \$6,000 deduction**
- **IRS Notice 6475 for amount of Economic Stimulus Payment**
- **IRS Notice 6419 for amount of Advance Child Credit**
- **Unemployment compensation or Family Leave payments (1099-G) –must be obtained on-line**
- 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 2021.
- Proof of disability for those claiming to be disabled for the 1st time in 2021.
- Your e-mail address.
- Amount of New Jersey Property Tax Reimbursement/Senior Freeze and/or Homestead Benefit
- W2's, 1099R's 1099INT's, 1099DIV's, 1099MISC's, 1099S's, 1098's, 1099SA's, etc.
- Final paystubs from each employer.
- Social Security Benefits. Gross amount received. (SSA-1099)
- Gambling winnings and losses to the extent of winnings. W-2Gs
- Alimony (paid or received) Name and Social Security number of recipient or payee – for divorces finalized before January 1, 2019 and not modified since January 1, 2019.
- Teachers' (K-12) – Classroom expenses – up to \$250 per teacher
- Energy Related Improvements on Principal Residence – exterior windows, doors, new heater, etc.
- 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)
 - For Real Estate Investment Property; 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 and MIP
- Margin/Investment interest
- Cash contributions and/or In-Kind Contributions (details and receipts for In-Kind contributions).
- 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
- Student Loan Interest – Form 1098-E
- 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