



Enclosed is a list of common documents required for preparation of 2022 tax returns. Not all items may apply to your specific situation, and may not be inclusive.

1. Voided check for account you would like potential refund to be deposited, do not worry about this if you would like IRS to send paper check
2. Driver's License for every taxpayer having taxes prepared
3. W2's
4. 1099's (including but not limited to Social Security, Retirement accounts, bank accounts that accrue interest)
5. K1's
6. Closing Disclosure for sale of property (Rental or Personal) as well as original cost of property
7. Business income & expenses
8. Rental property income & expenses
9. Farm income & expenses including type of farm for 2022
10. 1098's for Mortgage interest/Student Loan interest
11. Medical expenses
12. Property taxes paid; State/Local taxes paid
13. Charitable contributions paid
14. 1095-C for health insurance coverage through employer

Thank you!