HAPPY PIGGYBANK COMPANY PRESENTS:

TAX PREP INFORMATION I NEED TO DO YOUR RETURNS

1. Driver's license or passport
2. Your date of birth
3. Your social security number
4. How you list your profession
5. If you have children that you support, for each child:
   a. Name
      b. DOB
      c. SSN
      d. Full-time student?
      e. Lived with you the entire year?
      f. Did they earn any income?
      g. Did you pay more than 50% of their living expenses?
      h. Do they have any investment income?
6. Do you have any other people living with you for whom you paid more than 50% of their living expenses? If so, they may be considered dependents. We will talk more about that during our tax prep session.
7. Any charitable contributions you may have receipts for*.
8. If you're self-employed, we'll go over that in our intake session. I will have a spreadsheet customized to your profession for you to fill out that I'll send to you after our meeting.

PLEASE DO NOT SEND ANYTHING VIA TEXT!

HAPPY PIGGYBANK COMPANY PRESENTS:

TAX PREP DOCUMENTS I NEED TO DO YOUR RETURNS

1. W-2
2. 1099-NEC
3. 1099-MISC
4. 1099-K (Credit Card income)
5. SSA-1099 (Social Security Statement)
6. 1099-G (State tax refunds from prior year, other government income)
7. 1099-R (Retirement statement)
8. 1099-INT (Interest statement)
9. 1099-DIV (Dividends from investments)
10. 1099-B (Consolidated broker transactions)
11. 1099-DA (Digital assets aka crypto)
12. 1098-E (Student Loan Interest)
13. If you have Covered California (aka Obamacare), your 1095-A Statement
14. If you own your home:
    a. Your 1098 Mortgage statement
    b. Your property tax statement(s) for the year
    c. Your homeowner's insurance for the year
15. Your DMV fees - all vehicles that you've paid for during the year
16. If you contributed to a retirement account, to what kind of account (traditional or Roth IRA or something else) and how much
17. 1098-T (Tuition statement)
18. RRB-1099 (US Railroad retirement)
19. K-1 Income statement

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