



TAX DOCUMENT LISTING

- All W-2s received
- All 1099 forms -
 - 1099 investment brokerage reporting statements
 - 1099-C cancellation of debt
 - 1099-DIV dividends from investment and bank accounts
 - 1099-G unemployment collected (access form online)
 - 1099-INT interest from investment and bank accounts
 - 1099-MISC miscellaneous income
 - 1099-NEC non-employee compensation
 - 1099-Q distributions from a 529 College Savings Plan
 - 1099-R pension and IRA distributions
 - SSA-1099 Social Security benefits
 - Form W-2G gambling and lottery winnings
- All relevant Schedule K-1s from investments in
 - Partnerships,
 - LLCs
 - S-corporations
- Form 1098 Mortgage Interest Statement for all
 - primary,
 - secondary
 - and home equity loans
- Real estate taxes paid (if paid through mortgage, amount appears on Form 1098)
- Settlement statement/HUD 1 for any property
 - Refinanced
 - Purchased
 - Sold during tax year
- Form 1098-E student loan interest paid
- Form 1098-T tuition paid for
 - qualified higher education costs for taxpayer
 - and dependents
- New York State residents only,
 - year-end statement showing contributions to 529 College Savings Plan
 - copy of driver's license
- Childcare expenses,
 - including amounts
 - name
 - address
 - tax ID number of daycare provider
- Amounts for charitable donations (note IRS requires documentation to verify)
 - cash
 - and non-cash charitable donations

- Medical expenses, including:
 - Dental and vision
 - Prescriptions
 - Hospital and lab fees
 - Long-term care insurance premiums
 - Supplemental medical insurance premiums
 - Co-payments
 - HSA contributions
 - Medical supplies and medical travel
- Amounts and dates of all quarterly
 - Federal
 - and/or state estimated tax payments
- Total amount for retirement to be made or made by tax filing date
 - IRA
 - and/or SEP contributions
- Expenses for energy efficient improvements made to your primary residence
- Any major changes that have occurred within your family
 - Birth
 - Death
 - Divorce
 - Illness
 - Other

RENTAL PROPERTY

For each property,

- total gross rental income
- rental expenses by category, including:
 - Advertising
 - Commissions/management fees
 - Insurance
 - Mortgage interest
 - Business miles and necessary for your rental property
 - Real estate taxes
 - Repairs and maintenance
 - Supplies
 - Utilities
 - Other - as necessary for your business

Settlement statement/HUD 1 for any property bought or sold

BUSINESS OWNERS / SELF-EMPLOYED

- QB or the like back up preferred, but if not, a spreadsheet with the following
 - Total gross earnings
 - Business expenses analyzed by category, including:
 - Advertising
 - Business gifts
 - Commissions/fees
 - Computer/internet
 - Continuing education
 - Contract labor/W-2 forms
 - Dues/subscriptions
 - Health insurance premiums and premium costs

- Insurance costs (business policies)
- Licenses
- Loan statements/payments
- Materials and supplies
- Meals – not entertainment
- Mileage (business miles and total miles preferred)
- Office supplies
- Postage/delivery
- Professional fees (accounting, legal, etc.)
- Rent
- Repairs and maintenance
- Taxes paid, federal and state(s)
- Telephone/cell phone expenses
- Travel
- Utilities
- Other as necessary for your business

HOW TO SUBMIT YOUR TAX INFORMATION

- Submit paperwork in total or in piecemeal if preferred - email using SHARE FILE – I can email you the link or see website
- Mail via USPS or the method you prefer
- Drop off anytime or set up an appointment to meet to discuss and give me the documents
 - Office - 973-845-6100
 - Mobile - 973-303-3539
 - Fax - 973-377-9284 or 862-204-3458
 - Email – Mkenney@mckcpallc.com
 - Website – www.mckcpallc.com
- **FYI - I will return all documents, I only keep a scanned copy for my records not your originals**

NEW CLIENTS

- Copies of prior year federal and state income tax returns
- Full names of all on the returns to be filed
- Social Security numbers for all on the return to be filed (taxpayers and dependents)
- Dates of birth for taxpayer and all family members claimed as dependents on the returns to be filed



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