

KRIMSON TAX SERVICE

Client Required Documents

Personal:

- Social Security Number
- Spouse's Social Security Number
- Dependent's Social Security Number(s)
- Information from Child Care Provider
- Valid ID (Government or State ONLY)

Income:

- ✓ W-2
- ✓ 1099 Forms (Misc)
- ✓ 1099-G (Unemployment Income)
- ✓ Bank Interest Statement (Checking/Saving)
- ✓ Stock/Dividend Statement
- ✓ K-1 Statement
- ✓ Gambling Income (W-2G)
- ✓ Self-Employment Income

Deductions:

- ❖ Mortgage Interest Statement (Form 1098)
- ❖ Non Cash Contributions to Non Profits (Goodwill, Purple Heart, etc0
- ❖ Purchase or Sale of Primary Resident (HUD Statement)
- ❖ Rental Property Information
- ❖ Receipts for work related items
- ❖ Receipts for Business related items
- ❖ Utility bills for Business
- ❖ Mileage Logs
- ❖ Travel/Lodging Receipts (Work/Business)
- ❖ Meals/Entertainment (Work/Business)
- ❖ Child Care Receipts
- ❖ Education Receipts
- ❖ Medical receipts

Affordable Care Act:

- Form 1095-A If you enrolled in an insured plan through the Market Place (Exchange)
- Market Place Exemption Certificate – If you applied for and received an exemption for the Market Place.