



## LIST OF DOCUMENTS TO PREPARE YOUR TAXES

The following list covers most of the documents necessary to prepare your tax return:

### PERSONAL TAXES:

- Driver's license or official state ID.**
- Copy of federal and state statements from the previous year.
- W-2 forms.
- VOID or voided check.
- 1099G- Unemployment compensation.
- 1095A - Format for all persons who had the Obamacare subsidy in the previous year.
- All 1099-INTs (investment and bank accounts).
- All 1099-div (from investment accounts).
- All 1099-B (from investment accounts).
- All 1099R of income from retirement.
- SSA-1 099 If you receive Social Security income.
- List of medical expenses.  
(Note: They must add more than 10% of their income so they can be deductible)
- Letter of proof of donations to churches or non-profit foundations.

### IF YOU HAVE DEPENDENTS:

- Name, date of birth, social security number of each dependent.**
- Copy of the birth certificates of each dependent.**
- Proof of residence of the children - example letter from the school or doctor of the year 2019.**
- Name, address, SSN or EIN and amount paid to baby sitter or Daycare for care (if applicable).**

### IF I STUDY IN THE UNIVERSITY:

- Format 1098T of the university - if you or your child studied during 2019 and paid with your own money, whether by credit card, loans, or cash.

### IF YOU HAVE PROPERTY HOUSES OR PROPERTY {HOUSES, LAND ETC} IN THE USA OR ABROAD:

- All 1098 (mortgage interest statements).
- Block and Lot number of properties (for properties in New Jersey).
- Total income of income received.
- Expenses related to investment house (electricity, water, maintenance, repairs, insurance of house, professional expenses example lawyers, accountants).
- Documents of the closing of the mortgage loan (if I buy house or refinancing during the year).

### IF YOU WORK INDEPENDENT {SELF EMPLOYED}:

- All 1099s Miscellaneous received.
- If you do not have 1099. Total income and expenses received during the previous year example: telephone, gasoline, tolls, parking, miles driven, insurance, interest, taxes, rents, office implements, licenses, repairs, employees, and contractors (with or without 1099).
- The federal number of your company - EIN #.
- Sales price and base cost for shares or mutual funds sold (if applicable).
- Contributions to retirement plans, 401 K, IRA's and Roth IRA's.
- Sales tax receipt if I buy a car during the year.
- Name and SSN / ITIN of contractors to whom you will give 1099.

### IF YOU HAD BANK OR FINANCIAL ACCOUNTS ABROAD:

- All 1099 INT or 1099 DIV received from your bank abroad.
- Account statement with the name of the financial institution, account number, and maximum balance during the year. Note: If the sum of the balances of all financial accounts abroad exceeded \$ 10,000 at any time during the year, you must fill out the FATCA and FBAR formats.