

Mark Schwanbeck Tax Preparation

Mark Schwanbeck, EA

Enrolled Agent admitted to practice before the IRS

What We Need to Prepare Your Tax Return Checklist

Identification (First Year Only):

Copies of your:

- Valid driver's license or photo identification (self & spouse, if applicable) *
- Social Security cards for all persons listed on the return*
- Dates of birth for all persons listed on the return
- For children living with you, a copy of their birth certificate

Income Documents:

- Forms W-2 and 1099
- Social Security Benefits
- Unemployment Benefits
- 1099-INT, 1099-DIV, 1099-B, 1099-R (i.e., statements from banks and other financial institutions)
- Other statements, such as, pensions, stocks, interest and any documents showing taxes withheld.
- If self-employed or you own a business, records of all your income and expenses (Call to discuss)

Expenses and Deductions

- Mortgage Interest (Form 1098)
- Property Tax Statements
- Personal Property Tax Statements (in Virginia, the "Car Tax" payments)
- Tuition (Form 1098-T)
- List of Contributions (Name of Organization, Date of Contribution and Amount) OR copies of all receipts
- Dependent childcare information: payee's name, address and SSN or tax ID number

Other Documents

- Proof of account at financial institution for direct debit or deposit (voided check with Account and ABA routing numbers)
- Prior year tax return (first year only)
- Record of state and federal estimated tax payments
- Any letters from the IRS or state tax authority and a copy of your response

We need copies of these documents for our files. Please scan and upload to your ShareFile folder or snap a picture with your mobile phone and text to (703) 906-5056.