



*What to bring for an **individual** tax return:*

**INCOME:**

- W-2's
- 1099MISC
- 1099G
- 1099R (pensions)
- Social Security statements
- 1099 DIV
- 1099 INT
- Year-end brokerage statements
- K-1's (from partnerships or corporations)

*You should have a form from each source of income.*

**DEDUCTIONS:**

- 1095A, 1095B, or 1095C health insurance coverage statements
- Cash and non-cash charitable donation receipts
- 1098 mortgage statement
- Property taxes paid
- 1098T college tuition or loan interest
- Retirement contributions
- If estimated payments are made bring amounts and dates paid
- a copy of any new dependents social security card

*These are the most common deductions; feel free to bring any additional documentation that may pertain.*

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*What to bring for a **business** tax return:*

- December bank, credit card and loan statements
- Ending balance of any loans or liabilities on Dec 31<sup>st</sup>, including year to date loan interest paid (if no statement provided)
- Inventory counts and dollar value of inventory on Dec 31st
- Copies of new bank loans obtained
- Details of any equipment or fixed asset purchase over \$500
- Copies of any federal or state letters received during the year
- 1099's and 1099-K (income from credit cards) received
- Copies of all payroll forms (if we do not run your payroll) 941's, 940's, W-2's
- Information on health insurance paid through the business
- Sales tax paid and amount outstanding on Dec 31st
- Sales breakout by state, if applicable
- Information on changes in ownership, owners addresses, locations, or number of stores
- Year-end summary of business activity (QuickBooks accountant copy preferred)
- QuickBooks Password (if applicable)

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