The following is a list of tax items that you may need for your upcoming tax appointment. This list is intended to be used as a tool to aid in gathering your tax information. There may be more or less information required than what is listed below. Ultimately, what your CPA or tax preparer requests will be the documentation you will need for the preparation of your taxes.

If you are a new TAX client, you will need to bring the following to your appointment:

- Drivers License or other form of Federal ID
- Social Security Card of the Taxpayer
- Healthcare form 1095 A, B, C, or your Exemption form
- Dependent information
    - Names
    - Birthdays
    - Social Security Numbers
- Spouse information
    - Names
    - Birthdays
    - Social Security Numbers

If you are a new or a continuing TAX client, you will need any of the following that are applicable to you and/or your spouse and dependents:

- Completed Organizer3
    - One can be obtained through akcpas.com web page.
- List of estimated tax payments, including date paid and amount-(if any were made during the year. This EXCLUDES withholding from earned wages as reported on the W-2.)
- W-2's received for the year
- Permanent Fund Dividend 1099
- Any 1099's that were received during the tax year
- 1099-R forms received
- 1099-DIV forms received
- 1099-INT forms received
- 1099-G Unemployment forms received
- 1099-B Broker statement

    - Provide the cost and date of purchase of brokered sales if they are otherwise unreported on the 1099-B
- W-2G forms received
- Social Security 1099 received
- Jury Duty Pay amounts
- Property Tax statement
- Medical Expense summary
- Business Income and Expense summary
    - Profit and Loss statement, or complete the pages titled Business Income (Schedule C) in the organizer.
    - List of purchases of physical assets for use for the business
        - Date of purchase
        - Amount of purchase
        - Trade in information-if any
    - List of sales or disposals of assets
        - Date sold
        - Amount received
        - Items received in trade-if any
- Installment Sale Schedules
    - Dates of payments and amounts received of both principal and interest
- Home sale information
    - Date of original purchase and amount
    - Date of sale and sale amount
- Moving expenses-if the move was applicable for a job change
- Rental activity
    - Rents received by property
    - Expenses for rentals by property
    - Purchases of rental property
        - HUD Statement
    - Sales of rental property
        - HUD Statement
        - Date of purchase
    - Purchases or remodel information
        - Date of purchase or remodel
        - Amount
        - Useful life

- K-1's as received from partnership, and corporation activities
- Contribution amounts for the following accounts
    - Traditional IRA
    - Roth IRA
    - SEP, SIMPLE, and other plans
    - HSA
- Cost of any Self Employment Health Insurance
- 1098-E's received
- 1098-T's received
    - Cost of books and other qualified expenses for higher education
    - Number of years college attended
- 1098 Mortgage Interest Statement received
- List of Cash Contributions in total by the organization that you contributed to
- List of NON cash contributions by the organization that you contributed to
    - Date of contribution
    - Amount of original cost of contribution
    - Amount of the value of contribution
- Union and Professional Dues Paid
- Investment Expenses
- Prior year tax preparation costs
- Dependent care expenses
    - Child care costs per child
    - Child care provider name and EIN or Federal Identification number (Social Security Number if it is an individual)
    - Address of provider