418 Seward St Duane J. Gabriel, CPA

Seward, NE 68434 Ryan L. Burger, CPA

(402) 643-4557 Regan L. Else, CPA

www.gbecpa.com Jesse E. Skelton, CPA

Required tax information:

1. Last year’s tax return (NEW clients only)
2. Birthdays (and kids if applicable)
3. Phone number
4. Bank routing and account number (so we can automatically deposit your refund, if applicable)
5. Current address
6. Quarterly estimates paid (federal and state)
7. W-2’s
8. 1099-INT (bank/CD/money market interest income)
9. 1099-DIV (dividend income from investments)
10. 1099-B (sold stock investments)
11. 1099-MISC (if you did contracted labor)
12. 1099-R (distribution from pension, annuity, or retirement)
13. SSA-1099 (social security benefits)
14. 1099-SA (distribution from HSA)
15. 5498-SA (contribution to HSA)
16. 1095-A (market place health insurance)
17. 1098E (student loan interest)
18. 1098T (tuition statement, if you took college classes)
    1. $ amount spent on books during the year
19. 1098 (mortgage interest)
20. Motor vehicle taxes
21. Charitable Donations
    1. Including goodwill drop-offs
    2. Cash/check
22. What you spent on ‘housing’ during the year (including sales tax)
    1. Rent/Mortgage
    2. Mortgage interest
    3. Real estate taxes
    4. Homeowner’s association dues
    5. Household supplies
    6. Utilities (water, electric, gas, garbage)
    7. Internet
    8. Cable
    9. Phone/Cell phone
    10. Furniture, fixtures, appliances
    11. Yard supplies
    12. Other housing expenses (office supplies, computer, etc.)
23. All other 1098 or 1099 tax documents you might have
24. Closing Disclosure Statement (4-5 pages long) if you bought or sold a house or other property
25. Daycare costs (Name, Address, Tax ID of each provider)