

DOCUMENTS NEEDED FOR YOUR TAX PREPARATION

Please arrange your documents in the following order:

- Government Issued Picture ID (a driver's license will suffice).
- Social Security Card (or copy) **for each person listed on your return**. Your SSA 1099 is OK.
- Form 13614-C Intake/Interview & Quality Review Sheet. This **must** be completed in full in advance.
- Your Tax Records envelope from last year with all tax documents used to file that return.
- All current tax documents required for filing your current tax return including all that apply:
 1. SSA 1099 Social Security or Statement RRB 1099 Railroad Retirement
 2. W-2 Employer-Reported Income Statement
 3. 1099 INT Interest
 4. 1099 OID Original Issue Discount (Interest)
 5. 1099 DIV Dividend
 6. 1099-R Pension/Annuities, Retirement or Profit-Sharing Plans and RRB 1099
 7. 1099-G Gambling Winnings
 8. 1099 Misc All Miscellaneous Income Statements
 9. 1099 NEC Non-Employee Compensation
 10. Business Schedule C both income and expenses
 11. 1099 B Proceeds from Brokerage Statements, **all** pages sent to you.
 12. Capital Gains/Losses
 13. Capital Loss Carry forward information
 14. 1099-K Merchant Card and Third-Party Network Payments
 15. K-1 Beneficiary's Share of Income, deductions, Credits, ETC.
 16. Form 1095A - Affordable Health Care Statement (for Marketplace health insurance)
 17. Federal Estimated Income tax forms
 18. Totals paid for daycare provider and the daycare provider's tax identification number such as their Social Security number or Employer Identification Number.
 19. Itemized Deductions - Receipts for real estate taxes, sales tax paid on new car, boat, RV, plus medical, health insurance and long-term care premiums, charitable contributions, and mortgage interest are required. To minimize the tax preparation time, itemized deductions, including mileage for both medical and charitable activities must be summarized and totaled by the taxpayer.
 20. If you purchased a new car in 2025, you need to bring the sales receipt paperwork.
 21. If you have lost a spouse in 2025 a copy of the death certificate is required.
 22. Any correspondence you received from the IRS.
 23. Your IRS Personal Identification Number(PIN) if one was issued to you.
 24. For your refund to be direct deposited, or any tax due to be direct debited, you must provide a voided or copy of check for routing and account number verification. IRS is no longer sending paper checks.

➔ Visit our website, aarphawthorne.com, to obtain access to the 13614-C Intake and Interview form, and the Link to make your appointment. Phone line 352-717- 4125.

Complete and print this form prior to your appointment.