



RISE
CONSULTING, LLC

PERSONAL INFORMATION NEEDED FOR TAXES

Information about your income

- ☐ Income from jobs: forms W-2 for you and your spouse
- ☐ Investment income - various forms 1099 (-INT, -DIV, -8, etc.), K-1s, stock option information
- ☐ Income from state and local income tax refunds and/or unemployment: forms 1099-G
- ☐ Alimony received
- ☐ Business or farming income - profit/loss statement, capital equipment information
- ☐ If you use your home for business - home size, office size, home expenses, office expenses.
- ☐ IRA/pension distributions - forms 1099-R, 8606
- ☐ Rental property income/expense - profit/Loss statement, rental property suspended loss information
- ☐ Social Security benefits - forms SSA-1099
- ☐ Income from sales of property- original cost and cost of improvements, escrow closing statement, cancelled debt information (form 1099-C)
- ☐ Prior year installment sale information - forms 6252, principal and Interest collected during the year, SSN and address of payer
- ☐ Other miscellaneous income - jury duty, gambling winnings, Medical Savings Account(MSA), scholarships, etc.

Adjustments to your income: The following can help reduce the amount of your income that is taxed, which can increase your tax refund or lower the amount you owe.

- ☐ IRA contributions
- ☐ Energy credits
- ☐ Student loan interest
- ☐ Medical Savings Account (MSA) contributions
- ☐ Moving expenses
- ☐ Self-employed health insurance payments
- ☐ Keogh, SEP, SIMPLE and other self-employed pension plans
- ☐ Alimony paid
- ☐ Educator expenses

Itemized tax deductions and credits: The government offers a number of deductions and credits to help lower the tax burden on individuals, which means more money in your pocket. You'll need the documentation to make sure you get all the deductions and credits you deserve.

- ☐ Advance Child Tax Credit payment
- ☐ Child care costs - provider's name, address, tax id, and amount paid
- ☐ Education costs - forms 1098-T, education expenses
- ☐ Adoption costs - SSN of child, legal, medical, and transportation costs
- ☐ Home mortgage interest and points you paid - Forms 1098
- ☐ Investment interest expense
- ☐ Charitable donations -cash amounts and value of donated property, miles driven, and out-of-pocket expenses
- ☐ Casualty and theft losses -amount of damage, insurance reimbursements
- ☐ Other miscellaneous tax deductions -union dues, unreimbursed employee expenses(uniforms, supplies,. seminars, continuing education, publications, travel, etc.)
- ☐ Medical and dental expenses

Taxes you've paid: Properly documenting the taxes you've already paid can keep you from overpaying.

- ☐ State and local income taxes paid
- ☐ Real estate taxes paid
- ☐ Personal property taxes -vehicle license fee based on value

Other information:

- ☐ Estimated tax payment made during the year, prior year refund applied to current year, and any amount paid with an extension to file.
- ☐ Direct deposit information -routing and account numbers
- ☐ Foreign bank account information -location, name of bank, account number, peak value of account during the year