

Feichthaler Tax Services
1710 Cape Coral Pkwy. E.
Cape Coral, FL 33904
Phone (239) 898-8522

Documents Needed for Income Tax Preparation

APPOINTMENT – DATE : _____ TIME: _____

- W-2 (wages)
- 1099-R (retirement)
- 1099-Int (interest)
- 1099-Div (dividends)
- 1099-B (brokerage sales)
- 1099-MISC (rents, etc.)
- 1099 (any other)
- 1098-T (education)
- 1095-A, 1095-B, or 1095-C (health insurance)
- Schedules K-1 (forms 1065, 1120S, 1041)
- Annual brokerage statements
- 1098 (mortgage interest)
- Annual SSA statement reporting payments
- Form 8886 (reportable transactions)
- Closing disclosures (HUD-1 for real estate sales and purchases)
- Social security numbers and dates of birth of all dependents (if not previously provided)
- Copies of prior two years' tax returns (for new clients only)
- Dates and amounts of each estimated income tax payment
- Schedule of summarized business or rental income and expenses
- Other information statements including, but not limited to: real estate taxes paid, medical expenses paid, charitable contributions, unreimbursed employee business expenses, IRA contributions, and the name, address, amount paid to and tax I.D. number of all child care providers.