



Martisha Welch, CPA

We Make Accounting Less Taxing!

Personal Information

- Driver's License(s)/Passport (with valid dates)
- Social Security Card(s)
- Dependent(s), Birth Certificate(s), Proof of address
- 1099A forms for Marketplace Health Insurance (If Applicable)
- 1099 B or C forms for proof of healthcare (If Applicable)
- Prior Year's Tax Return (Federal and State) *New Clients Only*

Income Documents

- W2's / Wage Statements
- Self-employment business income and expenses (1099-MISC/1099-K)
- Unemployment Income Statement (1099-G)
- Interest, Dividend, Stock and Bond Statements (1099-INT/1099-DIV/1099-B)
- Rental Income and expenses
- Commissions paid/received
- Pension & Retirement income (1099-R)
- Social Security Income
- Lottery or gambling winning/losses

Expense Documents

- Alimony paid or received
- Business Mileage
- Student Loan Interest (1098-E)
- Tuition and Education expenses (1098-T)
- Out of pocket school expenses (Books / Computers)
- Cancelled Debt (1099-C)
- Medical & Dental Expenses
- Real Estate & Personal Property Taxes
- Charitable Donations (Cash and Non-cash)
- IRA Contributions
- Record of home sale or purchase

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**TAX – ACCOUNTING – QUICKBOOKS – PAYROLL
OUTSOURCED CFO – INCORPORATION SERVICES**

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