

PLEASE PROVIDE THE FOLLOWING DOCUMENTS:

ALL TAXPAYERS:

- _____ Forms W-2 (Wages)
- _____ Forms 1099 for:
 - Interest
 - Dividends
 - Unemployment compensation
 - State tax refunds
 - Social security benefits
 - Co-op or patronage dividends
 - Government program payments
 - Stock or bond sales
 - IRA account activity
- _____ Form 1095 (Health Insurance verification)
- _____ Form 1098 and interest paid statements (Mortgage interest etc)
- _____ Schedule K-1's (income/loss from partnerships, S Corporations)
- _____ Brokerage statements from Stock, bond, or other investment transactions
- _____ Record of estimated tax payments made
- _____ Closing statements pertaining to any real estate transactions
- _____ Name, address and social security or identification numbers of all child care providers
- _____ Statement from college for college tuition and fees
- _____ Any tax notices received from the IRS or other taxing authorities
- _____ All other supporting documents you feel may be necessary

FARMERS/RANCHERS AND BUSINESS OWNERS MAY ALSO NEED:

- _____ Refund gas tickets (if we are filing for Nebraska Fuel Tax Credit for you)
- _____ 1099 forms for hedging and commodity transactions, daily transaction sheets and monthly summaries
- _____ CCC Loan Transaction Repayment Summaries (need to request)
- _____ Bank issued "interest paid" statement
- _____ Purchase invoices showing Equipment purchased, sold or traded (note whether item is new or used)
- _____ Business use of auto(s) – (complete worksheet with corresponding organizer)
- _____ Copies of all employment forms filed (941, 941N, 943, 944, 940)
- _____ Record of all Payroll tax deposits made