



**PLEASE PROVIDE THE FOLLOWING DOCUMENTS:**

**ALL TAXPAYERS:**

\_\_\_\_ Forms W-2 (Wages) Overtime documentation from employer or last pay stub

\_\_\_\_ 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

\_\_\_\_\_ Bank Name

\_\_\_\_\_ Routing Number

\_\_\_\_\_ Account Number \*\*\*New requirement for 2025 for all payments and direct deposits

**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