mitchell & nemitz PA
CERTIFIED PUBLIC ACCOUNTANTS

(919) 556-9500
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What To Provide Your CPA at Mitchell & Nemitz, PA:

Sometimes the most difficult part of tax season is simply gathering all the necessary documents to provide to your CPA. Here at Mitchell & Nemitz, PA, we make it easy for you. Although every taxpayer has a unique situation, here is a checklist that can help you put together many common items for your return (not all these items are likely applicable to you):

Prior Year Tax Return Copies

- If you are a new client to Mitchell & Nemitz, PA, please bring copies of your last two federal and state income tax returns. If you had property that was depreciated in those years, ensure that the depreciation schedules are included in the returns.

General Information

- Full name, SSN, and dates of birth for the taxpayer, spouse, and dependents
- Voided check for direct deposit of refund
- Any estimated payments for Federal or State(s)
- 1099-G for any state refunds from the prior year

Income-Related Documents

- Employed
  - W-2
- Savings and Investment Income
  - Consolidated 1099s from your broker that shows all Dividends, Interest, or Stock Sales
  - Any individual 1099-B, 1099-Div, 1099-Int
- Retirement Income
  - 1099-R showing distributions from your retirement plans
  - SSA-1099 for your Social Security benefits
- Self-Employed
  - 1099-MISC forms
  - Income Statements showing all income and expenses by category for the year (i.e. advertising, supplies, etc.)
  - Auto – Business Mileage and Total Mileage for the vehicle
  - Home Office Square Footage
- Rental Income
  - Income Statements showing all income and expenses by category (i.e. insurance, repairs, etc.)
    - Details of any purchase made for the property in excess of $2,500

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    - Property Information
        - Purchase HUD-1
        - Sale HUD-1
        - Date at which property was available to rent
        - 1098 for the property
- Other Income
    - Schedule K-1s from any partnerships, S Corps, trusts, or estates.
    - Gambling Winnings and Losses

Itemized Deductions

- 1098 for mortgage on primary home
- Cash Donations
- Noncash donations with dollar value written on the receipts
- Medical Expenses
- Personal Property taxes paid on vehicles
- Gambling Losses

Health Care

- If you had an HSA, provide both a 5498SA and a 1099SA

Other Deductions

- 1098-E for Student Loan Interest
- 1098-T for Tuition paid
- Child-care expenses including the EIN and address for the location

These are not all the forms that are out there for tax purposes. Once preparation of your return begins, we will be in contact with you if there is anything else needed. Providing these items ahead of time eliminates stress about what you need to provide and allows us to complete your return in a timely manner.