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## SUGGESTED DOCUMENTS TO BRING TO YOUR INDIVIDUAL TAX PREPARATION APPOINTMENT

*Thank you for choosing Infinity Wealth Management, Inc. for your tax preparation services this year. Below is a suggested list of documents, if applicable, to bring to your tax preparer. Please plan to arrive 10 minutes early to complete paperwork.*

- Copy of Driver's License(s): Per new IRS Regulations
- Copy of last two years' tax returns (***new clients only***)
- Social Security numbers and dates of birth for all dependents
- ***Proof of residency and age for all dependents (ex. school records, medical records, birth certificate)***
- W-2 forms from employers
- 1099 forms from banks, pensions, annuities and IRA's (***IWM investment clients too!***)
- 1099 forms from Social Security
- Year end investment account statements
- Statements of capital gain or loss transactions with cost basis and sale price
- If sale of residence in tax year, the closing statements for both the purchase and sale of residence
- Summary of itemized deductions including residential property taxes, vehicle property tax, medical/nursing home expenses, charitable contributions, mortgage interest, and sales tax
- Summary of quarterly estimated tax payments paid to both federal and state governments
- Form 1095-A if you had health insurance through the Marketplace
- If you have a rental property: Summary of income and expenses and information to determine depreciation (ex: date property was put into service and purchase price of property)
- If you have a self-employment income: Summary of income and expenses
- Education tuition statements (form 1098-T)
- Anything received stating, "Important Tax Information"

**NOTE: To help keep our tax preparation rates low, we accept cash and checks only.**

*Providing our tax preparers with all of this vital information will make your tax preparation process go as smoothly as possible and help avoid delays in completing your tax return. Should you have any questions, please contact our office.*