

Tax Documents Needed

- Driver's License (Personal & Spouse if applicable)
- Social Security cards (Personal, Spouse & Dependents)
- Date of Birth (Personal, Spouse & Dependents)
- Last Year's Federal & State Tax Returns (If New Client)
- W-2's
- Self-Employment Business/Farm Income & Expenses (1099-Misc)
- Pension or Retirement Income (1099-R)
- Interest & Dividend Income (1099-INT & 1099-Div)
- Mortgage or Home Equity Loan Interest Paid (1098)
- State Income Tax Refund (1099-G)
- Social Security Income (SSA-1099)
- Unemployment Income (1099-G)
- Commissions Received/Paid
- Information of Sales of Stocks and/or Bonds (1099-B)
- Lottery or Gambling Winnings (W-2G) / Lottery or Gambling Losses
- Income & Expenses from Rentals
- IRA Contributions
- Childcare Expenses & Provider Information
- Medical, Eye Care & Dental Expenses
- Cash & Non-Cash Donations
- Record of Purchase or Sale of Residence
- Marketplace Health Insurance 1095A (if you had Marketplace health insurance)

**Bring your documents to Riverview Business Services 1099 Ferris Road, Amelia, Ohio 45102**  
**OR email: [taxes@taxestogo.us](mailto:taxes@taxestogo.us)**