



McCallson Tax & Accounting
206 NW 15th St.
Abilene, KS 67410
Office: 785-263-2161

Personal Information:

- Full names, SSN, and Birthdates of everyone on your tax return
- Phone numbers, Emails, and Occupation of each taxpayer, as well as a picture of your driver's licenses
- Virtual (Crypto) Currency information, if any was sent, sold, exchanged
- Last Year's Tax Return, if we don't already have it.

Income:

- W2 from Employer(s)
- 1099 NEC as Independent Contractor
- 1099 MISC Rents, other Income received (such as lawyers or royalties from book sales)
- 1099 R from Retirement (401K) withdrawal
- 1099 SSA from Social Security received
- 1099 B from sale of Stocks
- 1099 INT from Interest earned
- 1099 DIV from Dividends earned
- 1099 G from your prior year State Refund or Unemployment
- Alimony received, if applicable
- K1 if Owner/Partner of a business
- W2 G from Gambling Winnings
- Gross income from informal business earnings

Expenses:

- 1098 for Mortgage Interest paid
- Real Estate taxes paid (if not on 1098)
- 1098 T for Tuition paid
- 1098 E for Student Loan interest paid
- Any Alimony paid, include Name and SSN and DOB of Ex-Spouse, although not deductible presently
- Childcare expenses and EIN or SSN of caregiver
- Donations:
 - If Cash: List of Charities and/or Church(es) and amounts for each
 - If household items over \$500: The charity & address where you donated and value of items to be sold at charity prices.
- Solar Credit info, if applicable
- Home Energy Remodeling info: HVAC, doors, windows, roof, or insulation
- Expenses for business

Healthcare:

- 1095 A, B or C
- 1095 A is from the Marketplace (Healthcare.gov) and this form is vital
- 1099 SA - HSA Health Savings Account distribution (amount you spent)

Small Business:

- Income (in addition to any 1099 NEC or 1099 MISC forms)
- Expenses, (esp mileage, yr, make, model of vehicle used)

Rents:

- Income (Rent collected)
- Expenses (esp mortgage interest and real estate taxes, and any repairs/purchases/HOA fees)

Bank Account: for Direct Deposit of refund or Direct Debit to pay your tax liability with the tax return instead of sending a check