PROVEN STRATEGIES

Supporting Documentation for Tax Preparation

All Return Types:

Tax Organizers:

- Our digital tax organizers simplify the document gathering process and allow for document upload during completion: **https://portal.andersonadvisors.com/taxorganizer**
- For a PDF version of a digital tax organizer, please visit **https://andersonadvisors.com/client-forms/**

Prior Year Documentation:

- A copy of your Personal and Business income tax return from last year

This document provides a comprehensive list of supporting documents that may be required for the preparation of your personal and business entity tax returns. Additional documentation may be requested based on your individual circumstances.

Personal Tax Returns (Form 1040):

Income Documentation:

- Forms W-2: Wages, Salaries, Tips, and Gambling Winnings
- Forms 1099: Interest, Dividends, Retirement, Miscellaneous Income, Social Security, State or Local Refunds, etc.

Investment Documentation:

- Brokerage statements detailing investment transactions (stocks, bonds, options, etc.).
- Schedule K-1: Partnerships, S-Corporations, Estates, and Trusts.

Education Documentation:

- Statements supporting educational expenses, deductions, or distributions (Forms 1098-T, 1098-E, 1099-Q).

Healthcare Documentation:

- Forms 1095-A, 1095-B, and/or 1095-C: Health care coverage for the Premium Tax Credit.

Deduction Documentation:

- Statements supporting deductions for mortgage interest, taxes, and charitable contributions (including Form 1098-C).

Real Estate Documentation:

- Copies of closing statements regarding the sale, purchase or refinance of real property.

Tax Authority Correspondence:

- Any tax notices sent to you by the IRS or other taxing authority.

Please ensure all documents are legible and complete. If you have any questions regarding the required documentation, please contact us at **mytaxteam@andersonadvisors.com** or at **702-628-5236.**

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