



1253 Rucker Blvd  
STE C  
Enterprise, AL 36330

### **DOCUMENTS NEEDED TO PREPARE TAX RETURN:**

1. Client data sheet signed by taxpayer and spouse.
2. Picture ID, driver's License, or other government issued ID, for taxpayer and spouse.
3. Social Security Card for each person listed on the return. Taxpayer, spouse, all dependents.
4. If a new customer, a copy of pages one and two of the previous year's federal tax return, and all pages of any state tax return(s) that may have been filed can be very helpful but not required.
5. All wage statements such as W-2's, 1099's, and forms for received interest.
6. Any document of income from investment(s).
7. IRS statement if a PIN was assigned for identity purposes: NOT sent to most taxpayers.
8. Copy of a voided check for direct deposit.

### **DOCUMENTS THAT MAY PROVIDE EXTRA TAX SAVINGS:**

1. Tag receipts for each vehicle that you purchased a tag.
2. Mortgage statement(s) such as form 1098 that discloses interest, and taxes. The amount paid for hazard insurance is usually not needed unless you have a business.
3. Statements from student loan interest. Form 1098 E or substitute form.
4. College expenses: form 1098T, a list of expenses for books, and supplies.
5. Forms and information about moving expenses if you moved over 50 miles and are a member of the military.
6. Medical Bills. First check with Gold Star Tax before you gather these documents. Many taxpayers do not have enough medical payments to qualify for this deduction.
9. Any other document that you think may help. Send a text message or contact me by email, and we can help you determine if a document is needed.
10. Statement(s) from day care providers that contains an Employer Identification Number or a Social Security Number from the owner. It should list the total amount paid for daycare for each child.

Should you forget to include something, you can scan it into a folder on Google Drive and share that folder with [bwat2219@gmail.com](mailto:bwat2219@gmail.com). A text copy can also work in a pinch. If you have any other questions, please call us at 334.607.6006 or on my cell at 334.470.3755.

Sincerely,

Benjamin Lee Watson Jr.