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Dear Customer:

Welcome to 2024! We are ready to file your taxes for 2023. Below are some important documents you will need to bring, to prepare your Tax Return:

- Social Security or ITIN originals of the taxpayer, spouse, and dependents. New clients only.
- Driver's License or country of origin's identification (passport, etc.). New clients only.
- W2 Forms and 1099 MISC - NEC, for all the jobs performed during 2023.
- You must report all accounts you have in a foreign country.
- Void Check or routing number and bank account where you want your refund to be deposited.
- Form 1095A, 1095B, 1095C; sent by Affordable Care Act (ACA) better known as Obama Care.
- Birth Certificate of the dependents.
- School Records or Report Cards of the dependents. Children under 6 of age Bring medical Records.
- Form 1098T - Tuition Statement, for College/University tuition and book receipts paid by taxpayers or dependents.
- Letter from the financial institution, containing the total interest paid for student loans.
- Form 1099INT - Earned Interest
- Form 1099G and 1099 R, for Unemployment benefits or pensions; or any Form 1099.
- Form 1098 - Mortgage Interest, issued by the lending bank.
- Total medical expenses, of year 2023.
- If you bought a house for the first time, bring the "**Settlement Statement**" which should be among the signed documents provided by the Title Company.
- If you sold a house or a vacant lot, that sale must be reported.
- Letter from the nonprofit organization to which you made donations.
- Form 1099B, for any bought/sold shares in the stock market.
- Form(s) K1, if any.
- If you are, or your spouse is, an independent worker/contractor, please bring all sorted income and expenses. If that's not possible, we will help you classify them for an additional charge. You may also qualify for expense deductions for your home office (Please call for details).
- If you collect rental income from real estate property (house, condo, etc.), bring the Property Tax, interest forms and any other detailed expenses as well as any income received for the property and the first date of the lease, etc.
- And any other form(s) that says: "**FOR TAX PURPOSES ONLY**".

We appreciate your trust. If you have questions, please don't hesitate to call us. We will be happy to assist you.

Regards,

Clara Jimenez