HYH Consulting II, LLC

Office of Bo Yun Han, CFE, EA

Tax Return Checklist

1. Copy of last year's tax return for all new clients;
2. Date of Birth for everyone listed on the tax return (A copy of your ID is required if no face to face visit)
3. W2; 1099Misc; Income related to Business (K-1); Rentals; Pensions & Annuities; Alimony; Foreign Income; Social Security; Stocks & Bonds; Gambling; Interests & Dividends
4. Mortgage Interest Statements & Property Tax Records; State/Local Tax Refunds
5. Employment Related Expenses and Mileage records (not reimbursed to you)
6. Certificate of Credible Health Insurance Coverage (Provided by your insurance Company) (1095A; 1095B; 1095C)
7. Records of Charitable made of $250 or more
8. Medical Bills paid – unreimbursed premiums paid; deductible/copay receipts
9. IRA/Retirement Contribution records
10. Dividend/Interest/Distributions Income – supplied by the Bank (1099-R, 1099-DIV, 1099-INT, 1099-SA)
11. Investment accounts – supplied by Servicer (1099-B)
12. Retirement/Education Savings Contribution Records
13. Student Loan interests & Tuitions and Fees paid (supplied by educational institution: 1098-T)
14. Child/Dependent Care Expenses
15. Vehicle Tag and other Personal Property Taxes (paid to County)
16. Closing Statements for personal real estate transactions and Moving Expenses
17. Estimated Taxes Paid & Date of payment
18. Qualifying Purchase records for Energy Credit
19. Foreign Accounts: More than $10,000 at any time of the year – Bank Statement ending 12/31

** Not All item on this list may apply to you.
** If you were Self-Employed or a Shareholder of a Corporation/Partnership, additional information is needed to prepare your tax return. Please call us for assistance.

Please upload your documents using our Client Portal. If you need access, please call or email us and we will send you an invitation.