

 **MERRIGAN**
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TAX DOCUMENTS/INFORMATION TO PROVIDE

- Any tax statements received at the end of the year. Common examples include:
 - W-2s
 - Bank Interest Statements (1099-INT)
 - Retirement Distribution/Rollover Statements (1099-R)
 - Social Security Benefit Statements (SSA-1099)
 - 1099s associated with investment income:
 - Dividend Statements (1099-DIV)
 - Capital Gain/Loss Statements (1099-B)
 - Consolidated 1099 (a/k/a 1099 Composite)
 - Non-Employee Income Statements (1099-NEC)
 - Miscellaneous Income Statements (1099-MISC)
 - K-1s
 - Proof of Health Insurance Form (1099-HC) - *This is specific to MA tax returns.*
 - If health insurance is through federal health connector (Form 1095-**A**)
 - HSA/MSA Distribution Statements (1099-SA)
 - Student Loan Interest Statements (1098-E)
 - Unemployment Income Statements (1099-G), if applicable.
 - 529 Plan Distribution Statements (1099-Q)
 - Tuition Statements (1098-T)

- If you bought or sold real estate in 2024, please provide:
 - Settlement Statement (HUD-1) or Closing Disclosure; and
 - If sale, 1099-S (proceeds from real estate transaction)

- Mortgage Interest Statements (1098-MIS)

- Real Estate Taxes Paid (this is often reflected on your 1098-Mortgage Interest Statement)
 - Excise Taxes (paid to town/city for vehicles)

- Charitable Donations (DO NOT send receipts) – Please provide separate totals for CASH and NON-CASH donations (NON-CASH only relevant if you itemize your deductions)

- If you made any residential energy efficiency improvements, purchased an electric vehicle or installed residential renewable energy systems in 2024, please provide details

- Banking Information for Direct Deposit/Direct Debit (providing a voided check works)
 - (1) Bank Name, (2) Routing #, (3) Account #, and (4) Checking or Savings Account

- If you have dependent childcare expenses, we need the following information:
 - Dependent childcare (1) facility name, (2) business address, (3) Tax ID#
 - Which child expenses are for and how much paid

- If you applied for an IRS Identity Protection PIN, please provide the 6-digit PIN for Tax Year 2024

- If you have self-employment income, please see suggested **Schedule C organizer**
- If you have rental income from real estate, please see suggested **Schedule E organizer**

