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**TruNorth tax & Accounting LLC**

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# Personal Information

[ ]  Full name, SSN, and date of birth for you, your spouse, and dependents

[ ]  Current mailing address

[ ]  Bank account and routing number

[ ]  Prior year’s tax return

# Employment & income

[ ]  W-2 forms from all employers

[ ]  1099-NEC / 1099-MISC forms and income records

[ ]  1099-INT, 1099-DIV, 1099-B, brokerage statements

[ ]  1099-R, 1099-G, SSA-1099

[ ]  Other income: alimony, rental, hobby, royalties

# Homeowners \*(check only if you own a home)\*

[ ]  Mortgage interest statement (Form 1098)

[ ]  Property tax statements

[ ]  Closing statements (if you sold a home during the year)

[ ]  Records of home improvements during the year

# Parents/dependents \*(If applicable)\*

[ ]  Childcare expenses

[ ]  Health insurance info for dependents (Form 1095-A/B/C)

[ ]  Other depended related credits

# Students \*(check if you pay student tuition)\*

[ ]  Tuition and fees (Form 1098-T)

[ ]  Student loan interest (Form 1098-E)

[ ]  Scholarships or grants received

[ ]  Education-related expenses

[ ]  Work-study or on-campus employment income

# Deductions & Credits \*(if applicable)\*

[ ]  Charitable contributions

[ ]  Medical expenses

[ ]  State and local taxes paid

[ ]  Estimated tax payments

[ ]  Energy credits

# Self emplpyment / Business expenses \*(if applicable)\*

[ ]  Income from business (K-1)

[ ]  Business related expenses

[ ]  Vehicle info for business use

[ ]  Home office expenses

# Other situations \*(if applicable)\*

[ ]  Foreign accounts or foreign income

[ ]  Health savings accounts (HAS) contributions/distributions

[ ]  Any notices from IRS or state tax authorities

**With any questions Please reach out, we are here to help!**