**A logo for a company

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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!**