

Grasso & Kayser CPAs PC
2504 Albany Street
Schenectady, NY 12304
(518) 372-4070

ITEMS COMMONLY NEEDED

- Form W-2 for Wages
- 1099-G for Unemployment Benefits
- 1099-SSA for Social Security Benefits
- 1099-R for Retirement, Pensions & Annuities
- 1099-INT for Interest Income
- 1099-DIV for Dividend Income
- 1099-B for stocks/shares sold (date acquired, date sold, cost basis, and proceeds)
- 1099-MISC for Other Income
- Rental property income and expenses
- Closing statement for a house bought or sold
- Property and School taxes (Property Relief Credit or STAR Refund Check)
- 1098 for Mortgage Interest
- Medical expenses
- Cash and non-cash donations
- 1098-T for college students (Please provide a detailed breakdown of charges from and payments made to the college. Most students can access this information through their student accounts.)
- 1098-E for Student Loan Interest
- 1095-A for Marketplace Health Insurance through the Affordable Care Act
- NYS Driver's License ID #, Issue & Expiration Date, and Document # (If your driver's license has recently expired or needs to be updated with our office, please fill out the required information on page 1 of the 2020 Questionnaire.)

Additional Comments/Questions:

This list includes items commonly requested by our office to complete a tax return; however **this list does NOT include everything**. Please refer to your last years tax data to ensure that you are not missing anything for the current year.

PLEASE NOTE: To the best of your ability, please include all or the majority of your paperwork in your drop-off to avoid multiple trips to the office and reduce contact during the tax preparation process.