



**MERRIGAN  
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**TAX DOCUMENTS/INFORMATION TO PROVIDE**

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- 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 2023, 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) – only relevant if you itemize your deductions
  - Please provide separate totals for CASH and NON-CASH donations
  
- If you made any residential energy efficiency improvements, purchased an electric vehicle or installed residential renewable energy systems in 2023, 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 have self-employment income, please see suggested **Schedule C organizer**.
  
- If you have rental income from real estate, please see suggested **Schedule E organizer**.

