MERRIGAN & MERRIGAN

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 applicable to MA residents only***
  - 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)
  - Paid Medical & Family Leave Income Statements (1099-G)
  - 529 Plan Distribution Statements (1099-Q)
  - Tuition Statements (1098-T)
  - 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)
- If you bought or sold real estate in 2025, please provide:
  - Settlement Statement (HUD-1) or Closing Disclosure; and
  - If sale, 1099-S (proceeds from real estate transaction)
- Charitable Donations (DO NOT send receipts)
  - Please provide separate totals for MONETARY (cash/credit/check/etc.) and NON-CASH
- If you purchased a new vehicle assembled in the United States and have loan interest, please provide the end of the year 1098 statement detailing annual interest you paid on the car loan.
- If you were paid overtime, please provide your end of the year paystub.
- If you purchased a plug-in electric vehicle ***prior to 9/30/2025***, and the dealer did not claim the credit, please provide us with the bill of sale
- If you made any energy efficient home improvements, 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 an IRS Identity Protection (IP) PIN, please provide the 6-digit PIN for Tax Year 2025
- 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**