L.A. Jones Tax and
Accounting Services Inc.

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TAX FORMS AND OTHER INFORMATION NEEDED

PERSONAL INFORMATION
Any change in marital status, names, address, contact information, family members/dependents or blindness.

INCOME - any documents relating to wages, salaries, self-employment income, interest, dividends, taxable refunds, alimony received, sales of capital stock, distributions or rollovers from an IRA, pension or annuity, rental real estate, royalties, partnerships or S-corporations, trusts, farm income or loss, unemployment compensation, social security benefits, lottery winnings, and any other income (e.g., Forms W-2, 1099, W-2G, SSA-1099, K-1, etc.).

DEDUCTIONS FROM INCOME – any documents, invoices or receipts relating to 'educator' expenses, HSA deductions or payments, military moving expenses, contributions to SEP, SIMPLE, or other qualified plans, self-employed health insurance, alimony paid, penalties on early withdrawal from savings, IRA contributions, student loan interest paid (Form 1098-E), and any other 'pre-tax' or 'post-tax' deductions from gross income.

ITEMIZED DEDUCTIONS – any documents, invoices or receipts relating to qualified medical or dental expenses, premiums for long-term care or (post-tax) medical insurance, state or local income or sales taxes paid on major purchases, real estate taxes paid, local excise taxes paid, taxes paid to another state or county or city, Rhode Island TDI deductions, home mortgage interest or points paid (from Form 1098), mortgage insurance premiums, charitable contributions, investment interest paid, lottery losses, and any other itemize-able deductions.

TAX CREDITS federal or state – Any documents relating to the Affordable Care Act (Form 1095), child and dependent care expenses, qualified education expenses (Form 1098-T), qualified residential energy improvements, foreign taxes paid, income taxes withheld, estimated federal or state tax payments, taxes paid with extensions, and taxes paid to other states.

STATE DOCUMENTS
Any form concerning the Affordable Care Act, Mass. Form 1099-HC, any rent paid for a MA principal residence, FastLane or monthly MBTA transit or commuter rail payments over $150, payments to abate lead paint, septic improvements, use taxes owed and if over 65, assessed value of principal residence and water and sewer fees paid.

OTHER INFORMATION
Previous year's tax return for first-year clients, cryptocurrency transactions, mileage logs for business use of personal vehicles, actual business vehicle costs, basis information of stocks, residences or capital assets bought or sold, closing documents if you bought, sold or refinanced real property, home office deductions, bank information for direct deposits or direct debits and any other form you are not sure of.

FOREIGN ASSET REPORTING REQUIREMENT
Please be aware that U.S. taxpayers with specified foreign financial assets that exceed certain thresholds (including retirement accounts) must report those assets to the IRS on their federal income tax return. These accounts must also be reported to the United States Treasury Department on a different form. There are significant penalties for failure to disclose information about financial accounts held by U.S. taxpayers, or held by foreign entities in which U.S. taxpayers hold a substantial ownership interest.