



PARADIGM

Corporate Services

Needed Documents List:

☐ **Previous Tax Return**

☐ **Personal Information:**

☐ Name

☐ SSN

☐ Date of Birth

☐ Occupation

☐ Phone Number

☐ Email

☐ Address

☐ Marital Status

☐ Health Insurance Coverage

☐ **Dependent Information:**

☐ Name

☐ SSN

☐ Relationship with taxpayer

☐ Month in home

☐ Date of Birth

☐ Student or others

☐ **Child and Other Dependent Care Statement**

☐ **W-2**

☐ **Form 1099-INT (Interest Income) / Form 1099-OID (Original Issue Discount)**

☐ **Form 1099-DIV (Dividends and Distribution)**

☐ **Form 1099-B (Proceeds from Broker and Barter Exchange Transactions)**



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☐ **Other Income:**

- ☐ Forms 1099-G (Certain Government Payments)
- ☐ Forms 1099-MISC (Miscellaneous Information)
- ☐ Forms 1099-NEC (Nonemployee Compensation)
- ☐ Alimony Received

- ☐ Forms 1099-SSA (Social Security Benefits)
- ☐ Forms 1099-RRB (Railroad Retirement Benefits)
- ☐ Forms W-2G (Gambling winnings)

☐ **Expenses Information:**

- ☐ Medical Expenses (any expenses not including insurance)
- ☐ Dental Expenses
- ☐ Alimony Paid
- ☐ Donations to charity
- ☐ Interest Paid
- ☐ Other expenses

☐ **Auto Expense Related to Business:**

- ☐ Name of vehicle
- ☐ Date placed in service
- ☐ Number of miles (Business, commuting)
- ☐ Expenses (Gas, insurance, parking fees, repairs, etc.)

☐ **Office in Home:**

- ☐ Square footage for business
- ☐ Square footage of your home



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- ☐ Expenses (Mortgage interest, taxes, rent, utilities, etc.)
- ☐ Tuition Statement (Form 1098-T)
- ☐ Mortgage Interest Statement (Form 1098)
- ☐ If you have spouse and dependents, please attach above documents of them.
- ☐ Void check, if you prefer direct deposit for federal or state refunds

If you have a business, Please attach the following additional documents:

- ☐ **Business Information:**
 - ☐ Name
 - ☐ EIN
 - ☐ Address
 - ☐ Date incorporated and State
 - ☐ Principal business activity
- ☐ **Partnerships, S-corporations, Estates and Trust Information:**
 - ☐ Incorporation and Operating Documents
 - ☐ Corp Election Form 2553
- ☐ **Profit and Loss Statement (Income and Expenditure)**
- ☐ **Balance Sheets**