



# 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**