



What to Bring to your Tax Appointment

1. W-2 Wage & Earning Statements from employer(s)
2. A completed TAX ORGANIZER* or Profit & Loss Statement
3. A Balance Sheet that lists new assets acquired for current year
4. Any 1099's issued to you from banks, businesses or investment groups (i.e. self-employed income, interest, dividends, unemployment, sale of stocks, bonds, land, and equipment)
5. Statements of any stocks or bonds sold within the past year. This must include date of purchase and your cost at the time of purchase. If you have sold stocks/bonds in the past tax year, we need date purchased and what it cost you at the time of purchase.
6. Form 1095-A**. Your Health Insurance Marketplace statement. You MUST HAVE form 1095-A in order to file your taxes. **Your taxes CANNOT be filed without this form.**
7. NEW CLIENTS should bring their last three years of Federal (1040) and State (1040-ME) taxes.
8. Interest amounts paid on ALL loans including autos, home, business, etc.

**printable copies of our TAX ORGANIZERS can be found on our website,*

***If anyone in your household had a Marketplace plan in 2019, you should receive Form 1095-A, Health Insurance Marketplace Statement, by mail no later than mid-February. It may be available in your HealthCare.gov account as soon as mid-January.*