BIGGS FINANCIAL SERVICES

Building Trust, Building Wealth.

PERSONAL INFORMATION:

Legal Information:

- Full Name / DOB / SSN / Tax ID numbers for all family members
- Last Year's Tax Return
- Bank Information (direct deposit)

Previous Year's Federal & State Tax Returns

PERSONAL INCOME:

1. Personal Income Statements:

- W2, 1099-MISC, 1099-NEC (for help gathering this information, please refer to our Small Business/Tax Farm Preparation Checklist)

2. Investment or Interest Income Statements:

- These include forms 1099-INT, 1099-OID, and 1099-B as well as K-1.

3. Pension / IRA / Annuity Income:

- Form 1099-R

4. Social Security/RRB Income:

- Forms SSA-1099 and RRB-1099.

5. Income From the Sale of a Home or Property:

- Form 1099-S and Closing Statement (HUD)

6. Unemployment Compensation & State Tax Refunds:

- Form 1099-G

PERSONAL DEDUCTIONS:

1. Homeowner Expenses:

- Mortgage Interest (Form 1098) and property taxes paid

2. Education Expenses:

- Form 1098-T, Form 1098-E

3. IRA Contributions:

- Form 5498

4. Charitable Contributions:

- Church tithes, Goodwill, etc.

5. Child & Dependent Care Expenses

- Daycare statement form

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