



PVT Tax Services

6324 - 5th Avenue
Brooklyn, NY 11220
(718) 439-4283

8416 – 13th Avenue
Brooklyn, NY 11228
(718) 748-5959

Documents Needed to File Personal Taxes:

- Valid Driver's License
- Social Security Card
- Birth Certificates for Children (if applicable)
- Form W-2 – (Wages and Salary)
- Form W-2G – (Gambling Winnings)
- Form 1099 – R (Retirement Income)
- Form 1099 – Int (Interest)
- Form 1099 – Div (Dividends)
- SSA 1099 – (Social Security)
- 1099 NEC – (Independent Contractors)
- 1099 G – (Government Payments)
- 1099 – SA (MSA or HAS Distribution)
- 1099 – B (Broker or Barter Exchanges)
- RRB – 1099 (Railroad Retirement)
- Schedule k-1 (Partnership / S Corp Income or Losses)
- 1098 (Mortgage Interest)
- 1098 T (Tuition Payment)
- Form 1098-E – Student Loan Interest
- Form 1095 – Health Coverage (there are different versions and you may have more than one.)
- **Records and Receipts to Document:**
 - Unreimbursed mileage related to work or volunteering
 - Charitable donations
 - Contributions to retirement plans
 - Healthcare expenses
 - Self-employment income and expenses, including any:
 - Home office expenses
 - Health insurance premiums paid
 - Transportation costs
 - Advertising Fees
 - Rental property
 - Moving expenses, if you moved for a new job
 - Expenses for energy-efficient home improvements
 - Tuition or fees paid for education for you, your spouse, or dependents
 - Retirement accounts rollover
 - Child care and dependent care expenses, including the employer identification number (EIN) or SSN of the care provider
- A copy of last year's return.
- Financial account information to pay any balance due or receive any refund.