- General
    - Full name, social security number, and date of birth of taxpayer, spouse, and all dependents.
    - Bank account information for direct deposit of tax refunds.
    - Prior year tax return (first year clients only).
    - Settlement statements for any real estate transaction - purchase, sale or refinance.
- Income
    - W-2's
    - 1099-INT, 1099-DIV from banks, brokers.
        - Details of all stock sales including purchase information (cost, purchase date).
    - 1099-R's for retirement plan/pension distributions.
    - 1099-SSA's for social security benefits.
    - 1099-G's for state tax refunds, unemployment benefits.
    - W-2G's for gambling winnings.
    - K-1's from S-corporations, partnerships, trusts.
- Deductions
    - Mortgage interest, property taxes, and mortgage insurance on residence.
    - Personal property tax (ad valorem) on automobiles, boats, etc.
    - Charitable contributions - cash and non-cash.
    - Medical expenses.
        - Individual insurance premiums.
        - Prescription drugs.
        - Doctor, dental, hospital, etc.
- Adjustments/credits
    - Higher education expenses.
    - Student loan interest.
    - IRA contributions.
    - Alimony paid.
    - Educator expenses.
    - Child care expenses.
        - Amount paid.
        - Provider name, address, tax ID#.
    - Estimated tax payments.
- Business
    - See separate Business Summary
- Rental property
    - Settlement statement from purchase.
    - See separate Rental