

## TAX DOCUMENTS CHECKLIST: Items to Upload to ATG

[Secure File Pro: Portal Access](#)

---

- Valid Unexpired Identification and prior year(s) tax return(s), up to 3 years.
- Social Security cards and birth certificates for each individual named on tax return
- Proof of health insurance coverage for each individual named on tax return, Forms 1095B. Advance Premium Benefits received requires form 1095-A
- Earned Income documents: W2 Wages, W2G gambling winnings, including tracked losses, if any.
- Social Security and/or Retirement distributions reported on forms SSA1099, 1099R, etc
- Interest, Dividends, Stocks Sales reported on forms 1099-INT, DIV, 1099-B; Include supporting documents for Capital Assets
- Rental activities and Sole Proprietorship businesses require completed Income and Expense statements, or Profit and Loss, and/or Balance Sheets (bookkeeping records).
- K1 Forms from Partnerships, Corporations, LLC's, estates and/or Trusts, including basis tracked
- IRA year end statements (important for tracking balance)
- Medical expenses (unreimbursed/out of pocket), Long Term care insurance, including Advance Premium Credit benefits (form 1095-A)
- Records of Estimated Taxes paid (your cancelled checks are best substantiation)
- 1098 Forms for Mortgage or Student Loan Interest paid (for itemizing deductions)
- Donations on money to charity, with acknowledgment (for itemizing deductions)
- Donations of property to charity, with receipts (for itemizing deductions)
- Volunteer expense receipts, including mileage tracked (for itemizing deductions)
- Education Expenses paid for higher education for taxpayer, spouse or dependents (receipts)
- Job related expenses, including union dues, job seeking costs—2017 is last year able to deduct!
- Child Care expenses, including provider's name, address, SSN or EIN, and dollar amount spent for each child
- Trust instruments, Powers of Attorney, require full copies

AMARAL TAX GROUP  
90 West Main Avenue, Suite 5  
Morgan Hill, CA 95037  
408-782-7020 office