



HOW TO PROVIDE YOUR TAX DOCUMENTATION

Anderson, Davis & Associates, CPA, PA asks you to utilize one of the below methods to provide us your 2025 income tax information:

1. **Electronically (scanned/pdf) (Recommended)** - by using [THIS LINK](#) to our encrypted ShareFile system;
OR
2. **Paper documents (drop-off)** - place in our in-wall Drop Box located next to our 2nd floor Suite front door (Suite 204); OR
3. **Paper documents (mail courier)** - mail your documents directly to our office and suite address (see below).

If you plan to stop by our office, please call us when you are in our parking lot. This will allow us to efficiently serve you. Please remember to **always provide us your contact email address for the primary taxpayer and spouse, along with the best contact cell phone number.**

We ask that you provide us your complete tax information as soon as possible. Our goal is to be able to prepare your returns and file them on your behalf as soon as possible. We can only do that with your help.

Thank you and we look forward to working with you again this tax season!

Important Tax Documents/Information You Will Need to Provide Us

Income

W-2 for wages, tips, etc.	W-2G for gambling winnings	1099-NEC for nonemployee income
1099-DIV for dividends	1099-B proceeds from broker	SSA-1099 for Social Security
1099-INT for interest	1099-MISC for other income	1099-G for refunds & unemployment
1099-R for retirement	1099-Q qualified tuition program	1099-K for third-party network income

Deductions

1098 for mortgage interest	1098-T for tuition and related expenses
1099-SA for HSA's	Unreimbursed medical and dental expenses
Charitable donations	Form 5498 for IRA values and contributions
1098-E student loan interest	Property tax paid on your home or second home

Business

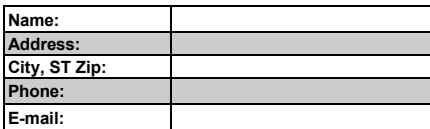
Schedule K-1 for partnerships, S corporations, and trusts or estates
Business (Schedule C) or Rental Properties (Schedule E) income and expense summary

Credits

Childcare costs, and the name, address, amount and ID # of the recipient
Estimated tax payment amounts and dates paid to IRS and States with proof of receipt through IRS and state websites or copy of cancelled checks
Nonbusiness Energy Property credit, Residential Clean Energy credit, New Clean Vehicle credit – please provide detail costs and documents for any such potential credits

Other

Any letters you received from the IRS or state tax authorities
IRS scrutiny of foreign accounts means that you need to be absolutely clear about any non-US accounts or income, so that we report it correctly
If you have a foreign bank account or assets, there might be reporting requirements and tax forms to file as noncompliance carries stiff penalties
If you have bought and/or sold a home, we need the closing statements on both the purchase and the sale, as well as a list of improvements (with cost) you made to the old home



	Income
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Self-Employment		
Employment Type	Code**	Amount

[illegible][illegible]

Rental Property

Foregin Income	
Country	Amount

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