admin@qwadvisors.com
Upload using the secure portal at https://questwealth.securefilepro.com

In preparation for completing your tax return, please provide the following:

- **A copy a state issued or government ID – this is an e-filing requirement to minimize identity theft**
    - Social Security Cards for you and any dependents
- Prior 2 years of tax returns, if available
- Summary of medical expenses, mortgage interest statements, charitable contributions, and receipts for other allowable itemized deductions
- Any information received from the Health Insurance Marketplace (e.g., Affordable Health Care Act), Form 1095-A
- Forms W-2 for wages
- Forms 1099 for self-employment income, interest income, dividend income, pensions and IRA distributions, real estate sale proceeds, sales of stocks, digital/virtual currency and other securities, and other income as well as for unemployment and gambling income
- EIN and profit and loss information for all business entities (e.g., LLC, corporation)
- Schedules K-1 for income from partnerships, estates, and Subchapter S corporations
- Settlement statements for the purchase, sale or refinance of real estate
    - For a sale, please provide the original purchase date and the cost of any improvements
- Form 1098 for interest (e.g., mortgage or student loan interest)
- Form 1098 for tuition and fees expenses
    - Receipts and canceled checks for college tuition for primary taxpayers and dependent students
- Any documentation associated with estimated tax payments made for federal and state taxes
- Any notices from the IRS, including an IP PIN or any other correspondence related to your prior tax situation
- A blank/voided check for bank routing and account number information needed for direct deposit

PO Box 870489 **Stone Mountain, GA 30087**
Office: 470 664-8669 **Fax: 866 564-3399**