

JOHNSON & ASSOCIATES

CERTIFIED PUBLIC ACCOUNTANTS

239 WEST 400 NORTH

LINDON, UT 84042

(801) 785-3161

We look forward to assisting you with your income tax preparation this tax season. Our goal is to make your visit with us as beneficial as possible. Please come prepared with your income tax documents and questions. Please bring all relevant tax documents to your appointment, such as:

- Copy of your prior year tax return(s)
- W-2(s)
- 1099(s)
- K-1(s)
- Unemployment forms
- SSA-1099(s) (Social security form)
- Brokerage statements from stock, bond or other investment transactions
- Closing statements from real estate transactions
- 1095-A, -B, -C (Affordable Care Act / Obamacare forms)
- 1098(s) (Mortgage Interest)
- 1098-C, -E, -T (Vehicle Contributions, Student Loan Interest, Tuition Statement)
- 1099-SA & 5498-SA (Health Savings Accounts)
- Charitable contribution receipts dated and signed
- Any tax notices received from the IRS or other taxing authorities