

What to Bring to Your Appointment

- Last year's tax return (*new clients only*)
- Tax Payer(s) Social Security card(s)
- Driver's License / Identification Card(s)
- Dependants' Social Security / ITIN numbers and dates of birth*
- Wage statements / W-2s
- Self-employment business income and expenses / 1099-MISC*/ 1099K*
- Partnerships and Corporations / K1*
- Pension, retirement income/1099-R*
- Unemployment income / 1099-G*
- Cancellation of Debt Amount/1099-C*
- Acquisition or Abandonment of Secured Property / 1099A
- Social Security income/SSA-1099*
- Rail Road Retirement / RRB-1099-R*
- IRA contributions*
- Statements on the sales of stocks or bonds/1099-B *
- Interest and dividend income / 1099-INT and 1099-DIV*
- Lottery or gambling winnings / W-2G and losses*
- Income and expenses from rental property*
- Alimony paid or received*
- Record of sale of residence / 1099S*
- Medical and dental expenses*
- Real estate and personal property taxes*
- Sales tax paid**
- Estimated taxes paid / Copies of canceled checks
- Cash and non-cash charitable donations copies of canceled checks and receipts*
- Mortgage or home equity loan interest paid/1098*
- Un-reimbursed employment-related expenses*
- Job-related educational expenses*
- Educator expenses**
- Tuition and Education Fees / 1098-T**
- Student loan interest / 1098-E*
- Receipt(s) for qualified energy efficient home improvements*
- Casualty or theft losses / copy of police report and insurance reimbursement*
- Child care expenses and provider information Name, Address and Tax ID Number*
- Moving Expenses*
- 1095A, 1095B, and or 1095C forms – verification of Health Care Coverage

*If Applicable

** Provision has expired. May be extended by Congress