



What you should bring to your appointment...

In order to save you time and money, please review the list below.
Bring with you all applicable items.

- ___ Social Security card(s) of taxpayer(s) and dependent(s)
- ___ Dependent(s) date(s) of birth
- ___ Driver's License of taxpayer(s)
- ___ Last year's federal and state tax returns
- ___ Wage Forms - Form W2
- ___ Pension or Retirement Income - Form 1099R
- ___ Interest and Dividend Income - Form 1099INT/1099DIV
- ___ State Income Tax Refund Amount - Form 1099G
- ___ Social Security Income - Form SSA
- ___ Unemployment Income - Form 1099G
- ___ Commissions Received or Paid
- ___ Sales of Stocks or Bonds - Form 1099B
- ___ Self-Employed Business Income - Form 1099MISC
- ___ Self-Employed Business Expenses (see Business Tax Tools)
- ___ Lottery or Gambling Winnings - Form W2G
- ___ Lottery or Gambling Losses
- ___ Income and Expenses from Rentals
- ___ Income from Partnerships, S Corporations, Trusts,
and Estates -Schedule K-1
- ___ IRA Contributions
- ___ Alimony Paid or Received
- ___ Child Care Expenses and Provider's Information
(Name, address, telephone number, SSN or EIN)
- ___ Medical, Eye Care, and Dental Expenses
- ___ Cash and Non cash Charitable Donations
- ___ Record of Purchase or Sale of Residence
- ___ Mortgage Interest Paid - Form 1098
- ___ Home Equity Loan Interest Paid - Form 1098
- ___ Other Interest Paid
- ___ Real Estate and Personal Property Taxes
- ___ State or Local Sales Taxes Paid
- ___ Unreimbursed Employment Related Expenses
- ___ Job Related Educational Expenses
- ___ Moving Expenses
- ___ Educator Expenses
- ___ Tuition and Education Fees - Form 1098T
- ___ Student Loan Interest - Form 1098E
- ___ Casualty or Theft Losses
- ___ Estimated Taxes