

WHAT TO BRING TO YOUR APPOINTMENT

- Social Security Card(s)
- Driver's Licenses(s)
- Dependant's social security numbers and dates of birth*
- Wage Statements
- W-2s
- Last year's federal and state tax return (if we did not prepare)
- 1095-A or other proof of health insurance
- Self-employment business income and expenses/ 1099-MISC/1099K*
- Commissions received/paid*
- Pension, retirement income/ 1099-R*
- Unemployment income/ 1099-G*
- Canceled debt amount/ 1099-C*
- Social Security income/ SSA-1099*
- IRA contributions*
- Statements on the sales of stocks or bonds/ 1099-B*
- Interest and dividend income/ 1099-INT/1099-DIV*
- Lottery or gambling winnings/losses*
- State refund amounts/1099-G*
- Income and expenses from rentals*
- Alimony paid or received*
- Record of purchase of sale of residence*
- Medical and dental expenses*
- Mortgage or home equity loan interest paid/1098*
- State and local taxes paid
- Sales tax paid**
- Estimated taxes or foreign taxes paid* (need check #'s, dates, and amounts)
- Tuition and education fees/ 1098-T*/ account summary
- Real estate and personal property taxes*
- Unreimbursed employment-related expenses*
- Unreimbursed Job-related educational expenses*
- Educator expenses (K-12 teachers)*
- Casualty or theft losses*
- Moving expenses*
- Student loan interest/ 1098-E*
- Cash and non-cash charitable donations* (need receipts)
- Receipt(s) for qualified energy efficient home improvements**
- Child care expenses* and provider name, address, and id number

*If applicable

** Provision has expired. May be extended by Congress. Bring just in case