

Items to bring to Your Tax Appointment:

Personal Information

- Social Security Card(s)
- Driver's License(s)
- Dependents' Social Security Numbers & Dates of Birth
- Last Year's Federal and State Tax Returns

Income and Source Forms

- Wage Statements – Form W-2
- Pension or Retirement Income – 1099 R
- Interest and Dividend Income – Form 1099-INT/Form 1099-DIV
- State Income Tax Refund Amount – Form 1099-G
- Social Security Income – Form SSA -1099
- Unemployment Income – Form 1099-G
- Commissions Received
- Sales of Stocks or Bonds – Form 1099-B
- IRA/401K Contributions and Distributions
- Lottery or Gambling Winnings – Form W-2G
- Alimony Paid or Received
- Cancellation of Debt – Form 1099-C

Business Information

- Commissions Paid
- Self-Employed Business/Farm Income & Expenses – Form 1099-MISC
- Income and Expenses From Rentals
- Income from Partnerships, S Corporations, Trusts, and Estates – Schedule K-1

Personal Expenses

- Lottery or Gambling Losses
- Medical, Eye Care, and Dental Expenses
- Cash and Non-cash Charitable Donations
- Record of Purchase or Sale of Real Estate
- Mortgage or Home Equity Loan Interest Paid – Form 1098
- Real Estate and Personal Property Taxes
- Moving Expenses
- Home Improvement Expenses
- Educator Expenses
- Tuition and Education Fees – Form 1098-T
- Student Loan Interest – Form 1098E
- Casualty/Theft Losses
- Estimated Taxes
- Foreign/Other Taxes Paid
- State and Local Tax Payments
- Other Interest Paid
- Child Care Expenses & Provider Information
- Unreimbursed Employment-Related Expenses
- Job-Related Educational Expenses