

What to bring to your tax appointment?

- Social Security Card(s)
- Driver's License(s)
- Dependents' Social Security Numbers & Dates of Birth
- Last Year's Federal and State Tax Returns
- Wage Statements (W-2)
- Pension or Retirement Income (1099-R)
- Interest and Dividend Income (1099-INT/DIV)
- State Income Tax Refund Amount (1099-G)
- Social Security Income (SSA)
- Unemployment Income (1099-G)
- Commissions Received/Paid (1099-Misc)
- Sales of Stocks or Bonds (1099-B)
- Merchant Services Income (1099-K)
- Self-Employed Business Income & Expenses (profit and loss statement)
- Income and Expenses from Rentals
- Lottery or Gambling Winnings and Losses
- Income from Partnerships, S Corporations, Trusts, and Estates
- IRA Contributions
- Alimony Paid or Received
- Child Care Expenses and Provider Address, and EIN
- Medical, Eye Care, and Dental Expenses
- Cash and Noncash Charitable Donations
- Record of Purchase or Sale of Residence
- Mortgage or Home Equity Loan Interest Paid
- Real Estate and Personal Property Taxes Paid
- State or Local Sales Taxes Paid
- Qualified Motor Vehicle Taxes
- Unreimbursed Employment-Related Expenses
- Job-Related Educational Expenses
- Tuition and Education Fees
- Student Loan Interest
- Casualty or Theft Losses
- Estimated Taxes Paid
- Foreign Taxes Paid