

WHAT TO BRING TO YOUR TAX APPOINTMENT

PLEASE NOTE, NOT ALL ITEMS WILL PERTAIN TO YOU.

THIS IS ONLY TO GIVE YOU AN IDEA OF WHAT IS NEEDED FOR YOUR APPOINTMENT.

PERSONAL

- SOCIAL SECURITY NUMBER OR TAX ID NUMBER
- YOUR SPOUSE'S FULL NAME AND SOCIAL SECURITY NUMBER OR TAX ID NUMBER
- YOUR DRIVER'S LICENSE OR STATE ISSUE ID.
- YOUR TAX RETURN FROM PREVIOUS YEAR (IF NEW CLIENT)

INFORMATION ON OTHERS BEING CLAIMED ON TAX RETURN

- DATES OF BIRTH AND SOCIAL SECURITY NUMBER OR TAX ID NUMBER
- CHILDCARE RECORDS (INCLUDING THE PROVIDERS TAX ID)
- INCOME OF OTHERS IN YOUR HOME
- AMOUNT OF ANY ALIMONY PAID AND EX-SPOUSES FULL NAME AND SOCIAL SECURITY NUMBER

EDUCATION

- 1098-T FROM INSTITUTIONS
- RECEIPTS THAT ITEMIZE QUALIFIED EDUCATIONAL EXPENSES
- RECORDS OF ANY SCHOLARSHIPS OR FELLOWSHIPS YOU RECEIVED
- 1098-E IF YOU PAID STUDENT LOAN INTEREST

SELF EMPLOYED

- FORM 1099-MISC, SCHEDULES K-1, INCOME RECORDS TO VERIFY AMOUNTS NOT REPORTED ON 1099
- RECORDS OF ALL EXPENSES
- BUSINESS USE ASSET INFORMATION FOR DEPRECIATION
- 'IN HOME' OFFICE INFORMATION

BUSINESS USE OF VEHICLE

- BUSINESS MILEAGE FOR THE YEAR (MILEAGE LOG)
- AMOUNT OF PARKING AND TOLLS PAID
- IF YOU WANT TO CLAIM ACTUAL EXPENSES (GAS, OIL, CAR WASHES, LICENSES, LEASE OR INTEREST EXPENSE)

RENTAL PROPERTY INCOME

- RECORDS OF INCOME AND EXPENSES
- RENTAL ASSET INFORMATION FOR DEPRECIATION

RETIREMENT INCOME AND CONTRIBUTIONS

- PENSION/IRA/ANNUITY INCOME (1099-R)
- SOCIAL SECURITY

SAVINGS AND INVESTMENTS

- INTEREST 1099-INT, DIVIDEND INCOME 1099-DIV
- INCOME FROM SALES OF STOCK OR OTHER PROPERTY (1099-B 1099-S)

HEALTH INSURANCE

- 1095-A (MARKETPLACE OR EXCHANGE), 1095-B OR 1095-C (EMPLOYER, MEDICARE, MEDICAID ECT)
- MARKETPLACE EXEMPTION CERTIFICATE (ECN) IF YOU APPLIED FOR AND RECEIVED AN EXEMPTION FROM THE MARKETPLACE

OTHER INCOME

- UNEMPLOYMENT, STATE TAX REFUND 1099-G
- GAMBLING INCOME W2-G
- AMOUNT OF ALIMONY RECEIVED
- HEALTH SAVINGS ACCOUNT AND LONG TERM CARE REIMBURSEMENT
- HOBBY INCOME AND EXPENSES
- OTHER 1099

OTHER DEDUCTIONS/CREDITS

- RECEIPTS FOR CLASSROOM EXPENSES
- FORMS 1098 OR OTHER MORTGAGE INTEREST STATEMENTS
- ALL OTHER 1098 FORMS
- REAL ESTATE AND PERSONAL PROPERTY TAX RECORDS
- VEHICLE SALES TAX PAID
- DONATIONS/CHARITABLE ORGANIZATIONS
- MEDICAL/DENTAL EXPENSES
- CHARITABLE MILES/MEDICAL MILES
- EMPLOYEE EXPENSES SUCH AS DUES, TOOLS, UNIFORMS, ECT.
- RECORD OF ESTIMATED TAX PAYMENTS MADE
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