



## What to Bring to Your Appointment

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| <input type="checkbox"/> Prior Year Tax Return ( <u>New Clients Only</u> )       | <input type="checkbox"/> Total income and total expenses from rentals*                           |
| <input type="checkbox"/> Social Security Card(s)                                 | <input type="checkbox"/> Alimony paid or received*   |
| <input type="checkbox"/> Driver's License(s)                                     | <input type="checkbox"/> Record of purchase or sale of residence*                                |
| <input type="checkbox"/> Dependents' Social Security numbers and dates of birth* | <input type="checkbox"/> Totaled medical and dental expenses*                                    |
| <input type="checkbox"/> Wage statements   | <input type="checkbox"/> Real estate and personal property taxes*                                |
| <input type="checkbox"/> W-2's   | <input type="checkbox"/> State or local taxes paid   |
| <input type="checkbox"/> Last year's Federal and State tax return                | <input type="checkbox"/> Sales tax paid*   |
| <input type="checkbox"/> Self-employment business income and<br>losses/1099-E*   | <input type="checkbox"/> Estimated taxes or foreign taxes paid*                                  |
| <input type="checkbox"/> Commissions received/paid*                              | <input type="checkbox"/> Mortgage or home equity loan interest paid/1098*                        |
| <input type="checkbox"/> Pension, retirement income/1099-R*                      | <input type="checkbox"/> Unreimbursed employment-related expenses*                               |
| <input type="checkbox"/> Unemployment income/1099-G*                             | <input type="checkbox"/> Job-related educational expenses*                                       |
| <input type="checkbox"/> Canceled Debt Amount/1099-C*                            | <input type="checkbox"/> Educator expenses*  |
| <input type="checkbox"/> Social Security income/SSA-1099*                        | <input type="checkbox"/> Tuition and Education Fees/1098-T*                                      |
| <input type="checkbox"/> IRA contributions*                                      | <input type="checkbox"/> Student loan interest/1098-E*   |
| <input type="checkbox"/> Statement on the sales of stocks or bonds/1099-B*       | <input type="checkbox"/> Moving expenses*  |
| <input type="checkbox"/> Interest and dividend income/1099-INT/1099-DIV*         | <input type="checkbox"/> Casualty or theft losses*   |
| <input type="checkbox"/> Lottery or gambling winnings/losses*                    | <input type="checkbox"/> Child care expenses and provider information*                           |
| <input type="checkbox"/> State refund amount/1099-G*                             | <input type="checkbox"/> Receipt(s) for qualified energy efficient home<br>improvements/1098-EE* |

\*If Applicable