



What to Bring to Your Appointment

- Prior Year Tax Return (New Clients Only)
- Social Security Card(s)
- Dependants' Social Security number and dates of birth
- Wage statements
- W-2's
- Last year's Federal and State tax return
- Self-employment business income and expenses
- Commissions received/paid
- Pension, retirement income/1099-R
- Unemployment income/1099G
- Canceled Debt Amount/1099-C
- Social Security Income/SSA-1099
- IRA contributions
- Statement on the sales of stocks or bonds/1099-B
- Interest and dividend income/1099-INT/1099-DIV
- Lottery or gambling winnings/losses*
- Sate refund amount/1099-G
- Total income and total expenses from rentals
- Record of purchase or sale of residence
- Totaled medical and dental expenses
- Real estate and personal prop0erty taxes
- State or local taxes paid
- Sales tax paid
- Estimated taxes or foreign taxes paid
- Mortgage or home equity loan interest paid/1098
- Tuition and Education Fees/1098-T
- Student loan interest/1098-E
- Child care expenses and provider information
- Alimony paid or received
- Educator expenses (K-12)
- Job-related educational expenses