

# Please bring the following items to your tax appointment:

## **Personal Information**

Social Security cards for all children in the household

Driver's licenses for adults in household

Birthdates for everyone on the return

Amount of any alimony paid and ex-spouse's full name and social security number

Your tax returns for the previous two years – NEW CLIENTS

Childcare records including the provider's tax ID number

Income of other adults in your home

Form 8332 showing that the child's custodial parent is releasing their right to claim child to you, the noncustodial parent

## **Education Payments**

Forms 1098 –T from educational institutions

Receipts that itemize qualified educational expenses including computers, books, and supplies

Records of any scholarships or fellowships you received

Form 1098-E I you paid any student loan interest

## **Employee Information**

Forms W-2

## **Self-Employment Information**

Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s

Record of all expenses – spreadsheet, QuickBooks, or credit card statements, receipts and bank records

Business-use asset information (cost, date placed in service, description) for depreciation

Office in home information including rent, mortgage statements, utilities, repairs, maintenance, total square footage of home and business space

## **Business use of vehicle information**

Total miles driven for the year, total business miles (not commuting), and the business purpose of the mileage

Amount of parking and tolls paid

Actual Expenses if claiming including maintenance, gas, repairs, licenses, lease payments, personal property tax, interest expense

## **Rental Property Income**

Records of income and expenses

Rental Asset information (cost, date placed in service, improvements) for depreciation

## **Retirement Income**

Pension/IRA/Annuity income forms 1099-R

Social Security/ Rail Road Benefit income forms 1099-SSA, RRB-1099

## **Savings and Investments**

Interest, dividend income forms 1099-INT, 1099-OID, 1099-DIV

Income from sales of stock or other property forms 1099-B, 1099-S

Dates of acquisition and records of your cost or other basis in property you sold if not reported on 1099-B

## **Other Income**

Unemployment, State tax refund form 1099-G

Gambling Income form W-2G or records showing income and losses

Amount of any alimony received

Health Savings Account and long term care reimbursements forms 1099-SA or 1099-LTC

Jury duty records

Hobby income and expenses

Prizes and awards

Other form 1099 including 1099-C cancellation of debt

## **Other deductions and Credits**

Early withdrawal penalties on certificates of deposit

Receipts for classroom expenses for Full Time K-12 educators

HSA contributions form 5498-SA

Records of moving expenses not reimbursed by employer

Mortgage interest statement form 1098

Amount of state/local sales tax paid on large purchases

Real Estate and personal property taxes including car registrations – only the TAX amounts, NO FEES

Records for donations to church, schools, or other charitable organizations

Records of non-cash donations – Goodwill, ARC

Amount paid for healthcare including insurance not covered under cafeteria 125 plan at employer, out of pocket expenses, drug costs, doctor and dentist bills, durable medical equipment

Amounts of miles driven for charitable or medical purposes

Expenses related to your investments

Amount paid for tax preparation including software

Employment-related expenses (dues, publications, tools, uniform cost and cleaning, and unreimbursed travel expense)

Job-hunting Expenses

Receipts for energy-saving home improvements

Record of estimated tax payments

## **IRA Information**

IRA contributions form 5498

Traditional IRA basis – if established