



Items to Bring to Your Appointment:

Prior Two Years' Tax Returns

- ❖ This is only needed if you are a new client

Personal and Dependent Identification Information

- ❖ Social security cards, ITINs (Individual Taxpayer Identification Number), and dates of birth, driver's license or state issues ID

Wage and Earning Statements: If you made money during the tax year in which you are filing, you need to bring in a record of income. This income includes:

- ❖ Form W-2, W-2G and 1099-R from all employers and payers
- ❖ Self-Employed business income (Forms 1099-MISC and 1099K)
- ❖ Records of job-related educational expenses and unreimbursed employment related expenses.
- ❖ Interest and Dividend statements
- ❖ Social Security (Form SSA-1099), State Income Tax Refund (Form 1099-G) and Unemployment Compensation (Form 1099-G)
- ❖ Information on Broker and Barter Exchange transactions
- ❖ Records of lottery or gambling winnings or losses
- ❖ Records of rental income and expenses
- ❖ Healthcare reimbursements
- ❖ Jury duty records
- ❖ Hobby income and expenses
- ❖ Prizes and awards
- ❖ Alimony received

Expense Records: Gather records for the following types of expenses:

- ❖ Self-Employed business expenses (preferably in an excel or word document; categorized and totaled)
- ❖ Mortgage Interest Statement – Form 1098 (including home equity loans) and records of the purchase or sale of your residence



- ❖ Records of real estate and personal property taxes paid
- ❖ Records of state or local taxes paid (including sales tax for large purchases such as automobiles, boats, building products, etc.)
- ❖ Records of medical, eye care and dental expenses and mileage
- ❖ Receipts for cash and non-cash charitable contributions
- ❖ Mileage records and expenses incurred conducting volunteer work for charitable organizations
- ❖ Tuition and Education Fees paid and Student Loan Interest paid
- ❖ Records of moving expenses paid and any casualty or theft losses.
- ❖ Total amount paid for a daycare provider and the daycare provider's tax identifying number (the provider's Social Security Number or Employer Identification Number)
- ❖ Alimony payments
- ❖ Records of any qualified energy efficient home improvements purchases
- ❖ Records of federal and state estimated taxes and foreign taxes paid
- ❖ Job hunting expenses

Health Insurance Documents

- ❖ Health Insurance Marketplace Statement (Form 1095-A)
- ❖ Health Coverage Statements from your Insurer or Employer (Form 1095-B/1095-C)

IRA Information

- ❖ Amount contributed for the tax year for which you are filing
- ❖ Traditional IRA basis
- ❖ Value of IRAs as of December 31 of the tax year for which you are filing

Business Expense Receipts: Expenses must be listed on an excel or word document, categorized and totaled.

- ❖ Mileage
- ❖ Meals and Lodging expenses
- ❖ Travel expenses
- ❖ Records of educator expenses paid
- ❖ Parking and tolls amounts
- ❖ Office in home information



- If You Were Affected by a Disaster:** There are deductions that are applicable if you were affected by a federally declared disaster.
 - ❖ Records of property loss
 - ❖ Records of building/repair costs
 - ❖ Insurance reimbursement/claims to be paid
 - ❖ FEMA assistance information

- Business Use of Home Information:** If you use a part of your home for your business, bring the following:
 - ❖ Square footage calculation of the area used for business
 - ❖ The date you began using the space for business
 - ❖ Original purchase price paid for the property
 - ❖ Summary of your utility expenses (gas, electric, oil, condo fees, landscaping, maintenance, etc.)
 - ❖ Major home improvements and direct office expenses (repairs, business phone, etc.)