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HOW TO PREPARE FOR YOUR TAX APPOINTMENT

Gather together the following documentation and bring to your tax appointment:

Getting Started

- Copy of last years' taxes (if you are a new client)
- Your Social Security number and Driver's License
- Social Security numbers and birthdates for your spouse, children and/or other dependents
- Estimated taxes paid during the year
- 1095 forms reporting Health Insurance Coverage for you, your spouse, children/other dependents
- Bank account and routing numbers for direct credit/debit of your refund or amount owed

Gathering Your Income

- W-2s from your employers
- 1099-MISC forms for self-employment income
- K-1 forms for income from a partnership, small business, or trust
- 1099-SSA forms showing Social Security received
- 1099-R forms for retirement distributions
- Other self-employment income
- Rental income
- Alimony

Checking Your Investments

- 1099-INT (interest) forms
- 1099-DIV (dividends) forms
- 1099 Brokerage Statements

Including Your Deductions

- 1098 forms reporting Mortgage interest
- 1098-E forms reporting student loan interest
- Other expenses: moving, college, medical, dental expenses
- Real estate taxes
- Daycare or childcare costs
- Unreimbursed employee expenses (union dues, uniforms, etc.)
- Contributions to traditional or SEP-IRA
- Gifts to charities and churches

And any and all questions and documents you may have related to this year's tax return