



What do I Bring to My Tax Appointment?

Personal Information

Taxpayer

- Valid Identification
- Social Security Card
- Proof of Residence

Spouse's

- Valid Identification
- Social Security Card

Dependent's

- Social Security Card
- Birth Certificate
- Medical Records (under 5 yrs)
- Childcare records (including the provider's tax ID number, if applicable)
- Form 8332 showing that the child's custodial parents is releasing their right to claim a child to you, the non-custodial parent (if applicable)
- College Student 1098-T or/and 1098-E (if applicable)

Sources of Income

Employed

- Forms W2

Unemployed/Other

- Unemployment, state tax refund (1099G)

Self-Employed

- Forms 1099-MISC
- Sch K-1
- 1099-K
- Records of all expenses (check registers or credit card statements, and receipts)
- Business-use asset information
- Office in home (if applicable)
- Total business miles driven for the year
- Amount of parking and tolls paid

Insurance

- Form 1095-A (if applicable)
- Form 1095-B (if applicable)
- Form 1095-C (if applicable)

Retirement Income/SSI

- Pension/IRA/annuity income-R)
- Social Security (1099-SSA)

Other Income & Losses

- Gambling income (W-2G)
- Amount of alimony received and ex-spouse's name
- Healthcare reimbursements (1099-SA or 1099-LTC)
- Jury Duty Records
- Hobby income and expenses
- Prized and awards
- Other 1099
- Rental Income (records of income & expenses)

Savings and Investments

- Interest, dividend income (1099-INT, 1099-OID), 1099-DIV)
- Income from sales of stock or property (1099-B, 1099-S)

IRA Information

- Amount contributed (if applicable)
- Traditional IRA basis

Itemizing deductions

- Forms 1098 or other mortgage statements
- Real estate and personal property tax records
- Charitable donations
- Employment related expenses

Call or Email to Reserve!

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