

What Do I Bring To My Tax Appointment ?

Personal Information

- Last Years Tax Return
- Drivers License
- You/Spouse/Dependents- Social Security Card(s)
- Married/Recently Married- Marriage Certificate
- Child Dependent Care Records (Including ID #)
- ** Did The IRS issue you a filing PIN? If Yes, bring PIN _____

Employee Information

- Form **W-2** from ALL jobs

Self-Employed Information

- Form(s) **1099-MISC**
- Can't Provide 1099-MISC form, Bring all Checks Received.
- All Work-Related Expenses (Receipts)
Print form "1099/Business Check List**" from website for deductible expense

Education

- Form **1098-T** Student Tuition Statement
- Form **1098-E** Student Loan Interest Statement
- Other Student Expenses not covered by Financial Aid/Student Loan
(Ex: Laptop, Books, Software)

Medical

- Form **1095-A** OBAMA Care
- All Medical Expenses *If Itemizing deductions

Itemized Deduction

- Form **1098** Mortgage Interest Statement
- Property Taxes
- All Medical Expenses
- Charitable Contributions
- Job Expenses/Miscellaneous Deductions
 1. Unreimbursed Business Expenses (Tools, Uniforms, Subscriptions, Fee's, Travel, Hair Cut)
 2. Tax Preparation Fee's
 3. Purchase a New Vehicle? – Amount of Sales Taxes paid
 4. Job Hunting Expenses