

## What to Bring to Your Tax Appointment

- Last year's income tax returns (if new client)
- Social Security card(s) for everyone on your return (if new client or new dependent)
- Driver's License or other state-issued photo ID for all adults on your return
- Dates of birth for all persons on your return
- Banking information, for direct-deposit of refunds
- Form(s) W-2 for wages
- Form(s) 1099-INT, 1099-DIV, 1099-B or brokerage statement for investment income
- Form(s) 1099-G for unemployment or state tax refunds
- Form(s) 1099-R for pension, annuity, IRA or other retirement income
- Form(s) SSA-1099 for Social Security income
- Form(s) RRB-1099 for Railroad Retirement income
- Form(s) 1099-C or 1099-A for cancellation of debt income
- Form(s) 1099-S for real estate sale income
- Form(s) 1099-MISC for business or other income
- Form(s) 1099-K for business income
- Form(s) K-1 for income from partnerships, s-corps, estates, or trusts
- Form(s) 1095-A/1095-B/1095-C for health insurance coverage information for everyone on the return
- Business income and expenses (include mileage)
- Rental income and expenses (include mileage)
- Alimony received or paid
- Gambling or lottery winnings and losses (may or may not be on Form W-2G)
- Estimated tax payments made
- Educator expenses, for K-12 teachers
- Form(s) 1098-T for higher education expenses paid
- Child care expenses paid and care provider information
- Form(s) 1098-E for student loan interest paid
- Moving expenses, if for job relocation (include mileage)
- Receipts for purchases of qualified energy-efficient home improvements
- Medical and dental expenses (include mileage)
- State or local taxes paid, including sales tax on big-ticket items
- Real estate taxes paid
- Personal property taxes paid
- Form(s) 1098 for mortgage interest paid
- Cash and non-cash charitable donations made (include charitable mileage)
- Unreimbursed employment-related expenses (include mileage)
- Investment advisory fees paid
- Casualty or theft losses