

Here's what you'll need to bring to your tax appointment

Personal Information

- Proof of Identification for yourself and spouse (Driver's license, Government issued Photo I.D.)
- If you are a new client last year's income tax forms
- Name, address, Social Security cards for you, spouse and dependents on the tax return
- Birth dates for you, your spouse and any dependents on the tax return
- Proof of residency of any dependent(s) on tax return-examples: school records or medical records with dependent's name and address
- Daycare providers name, address, Employers Identification number or Social Security number
- Banking information if you want your refund direct deposited
- Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you
- Amount of earned income of dependents if they worked
- Contact information such as phone numbers and email addresses
- Health Care Coverage forms (1095A, 1095B, 1095C)

Income information required

- Wage information (form W-2)
- Unemployment, state tax refund(1099-G)
- Interest and/or dividend income (1099-INT, 1099-OID, 1099-DIV)
- Social Security, Railroad Retirement Benefits (1099-SSA, RRD-1099)
- Pension, IRA, Annuity income (1099-R)
- Gambling income (W-2G or records showing income as well as gambling losses records)
- Amount of alimony received and ex-spouses name
- Health care reimbursements (1099-SA, or 1099-LTC)
- Jury duty records
- Prizes, awards and any bonuses received
- Hobby income
- Rental income
- Income from sales of stock or other property (1099-B, 1099-S)
- Forms 1099-MISC or K-1

Expense information required

- Dependent care costs
- Dates of acquisition and records of your cost or other basis in property you sold
- Gambling loss records
- Documentation for investments sold during the year (1099-B)
- Hobby expenses
- Rental expenses

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- Rental asset information (cost of building and land, date placed in service)
- Records of medical, dental and eye care expenses including health insurance premiums paid
- Receipts for cash and noncash charitable contributions
- Investment expenses
- Real estate and personal property tax records
- Tuition statements showing what you received in grants and amount of scholarships and fellowships you received
- Forms 1099-T, to show college tuition paid
- 1099-E, to show student loan interest paid
- Receipts for college books purchased
- Amounts contributed to retirement accounts and the value of the accounts at the end of the tax year
- Job-hunting expenses
- Employment related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Miles driven for charitable or medical purpose
- Dates and amounts of estimated tax payments to Federal and State Government
- HUD statement showing closing date of home purchase
- Total business miles driven for the year
- Number of days spent away from your tax home for work over 8 hours away
- Moving expense records