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WHAT TO BRING TO YOUR APPOINTMENT

- Social Security Card(s)
 - Driver's Licenses(s)
 - Dependant's social security numbers and dates of birth*
 - Wage Statements
 - W-2s
 - Last year's federal and state tax return (if we did not prepare)
 - 1095-A, B or C; you will have 1 of these
 - Self-employment business income and expenses/ 1099-MISC/1099K*
 - Commissions received/paid*
 - Pension, retirement income/ 1099-R*
 - Unemployment income/ 1099-G*
 - Canceled debt amount/ 1099-C*
 - Social Security income/ SSA-1099*
 - IRA contributions*
 - Statements on the sales of stocks or bonds/ 1099-B*
 - Interest and dividend income/ 1099-INT/1099-DIV*
 - Lottery or gambling winnings/losses*
 - State refund amounts/1099-G*
 - Income and expenses from rentals*
 - Alimony paid or received*
 - Record of purchase of sale of residence*
 - Medical and dental expenses*
 - Mortgage or home equity loan interest paid/1098*
 - State and local taxes paid
 - Sales tax paid**
 - Estimated taxes or foreign taxes paid* (need check #'s, dates, and amounts)
 - Tuition and education fees/ 1098-T*/ account summary
 - Real estate and personal property taxes*
 - Unreimbursed employment-related expenses*
 - Unreimbursed Job-related or educational expenses*
 - Educator expenses (K-12 teachers)*
 - Casualty or theft losses*
 - Moving expenses*
 - Student loan interest/ 1098-E*
 - Cash and non-cash charitable donations* (need receipts)
 - Receipt(s) for qualified energy efficient home improvements**
 - Child care expenses* and provider name, address, and id number
- *If applicable
** Provision has expired. May be extended by Congress. Bring just in case