



WHAT SHOULD YOU BRING TO YOUR APPOINTMENT?

Appointment Checklist For You	
W-2 Form	<input type="checkbox"/>
Drivers License(s)	<input type="checkbox"/>
Social Security card(s)	<input type="checkbox"/>
Last year's Federal and State tax returns	<input type="checkbox"/>
Social Security numbers and birth day of dependents	<input type="checkbox"/>
Real Estate	
Real Estate taxes paid	<input type="checkbox"/>
Personal property taxes paid	<input type="checkbox"/>
Mortgage or home equity loan interest paid / Form 1098	<input type="checkbox"/>
Record of new home purchase or sale	<input type="checkbox"/>
Rental income and expenses	<input type="checkbox"/>
State & Local Taxes	
State or local taxes paid	<input type="checkbox"/>
State refund amount / Form 1099-G	<input type="checkbox"/>
Estimated taxes or foreign taxes paid	<input type="checkbox"/>
Income Sources	
Self-employed business income and expenses / Form 1099MISC	<input type="checkbox"/>
Commissions you received or paid	<input type="checkbox"/>
Pension or retirement income / Form 1099R	<input type="checkbox"/>
Unemployment income / Form 1099G	<input type="checkbox"/>
Social Security Income / Form SSA1099	<input type="checkbox"/>
Alimony paid or received	<input type="checkbox"/>
Lottery or gambling winnings/losses	<input type="checkbox"/>
Partnership or Corporate Ownership / Schedule K-1	<input type="checkbox"/>
Estate or Trust Ownership / Schedule K-1	<input type="checkbox"/>
Savings & Investments	
IRA contributions	<input type="checkbox"/>
Interest and dividend income / Form 1099INT or Form 1099DIV	<input type="checkbox"/>
Statements on stock or bond sales / Form 1099B	<input type="checkbox"/>

Family	
Medical and dental expenses	<input type="checkbox"/>
Child care expenses and provider information	<input type="checkbox"/>
Mileage records to doctor appointments	<input type="checkbox"/>
Health Insurance verification / Form 1095 A, B or C	<input type="checkbox"/>
Proof that child lives in household	<input type="checkbox"/>
Job-related educational expenses	<input type="checkbox"/>
Educated Expenses (Unreimbursed)	
Classroom expenses for teachers	<input type="checkbox"/>
Tuition, books, supplies/equipment needed for a course; also include financial transcript showing amounts charged and payments made / Form 1098T.	<input type="checkbox"/>
Student loan interest / 1098E	<input type="checkbox"/>
Other	
Charitable donations, cash and non-cash	<input type="checkbox"/>
Qualified casualty losses (note:theft losses no longer included)	<input type="checkbox"/>
Mileage records for travel to and from Goodwill, Salvation Army, charity events, volunteer work, etc.	<input type="checkbox"/>
Foreign Investments & Holdings - ownership of foreign bank accounts, business interests or stocks; also include any accounts with signatory authority	<input type="checkbox"/>