What to Bring to Your Tax Appointment

Any tax forms you have received:

- W-2s and 1099s
- Interest and dividend statements including nontaxable accounts
- Year-end broker statements. Did you sell any stocks or mutual funds? We will need to know when you purchased them and how much you paid.
- Retirement, social security, IRA income
- Self-employment or cash income
- Unemployment benefits
- Gambling income and records of losses
- **Any forms you receive related to health insurance coverage** (these will be new to most of you this year!)

Possible deductions

- Mortgage interest statement
- Property tax paid
- Sales tax deductions – save receipts for new vehicle purchases and home improvements
- RTA tax paid with car registration (shown on the registration you got with your tabs)
- Did you refinance real estate? Bring us the closing documents.
- Charitable contributions, both cash and items

Did you sell your home or other real estate? Please bring in the closing documents and any 1099S you may have received.

Did you pay for daycare for a dependent? Bring the amount paid, and the name, address and federal tax id number of the provider.

Students on the return? Bring 1098 T from the University, College or Technical School. Bring receipts for books and the amount of tuition you actually paid. A billing statement from the school showing all payments is very helpful. If you made payments on a student loan, bring the 1098E.

Did you use a car for business? We will need to know how many business miles you drove. We also will ask for commuting miles and personal miles.

Please bring social security cards for any new family members, last year's tax return if we did not prepare it and a check if you want to set up direct deposit of your refund.

Questions? Call us!