

What to Bring to Your Tax Appointment

Any tax forms you have received:

- W-2s and 1099s
- Interest and dividend statements including non-taxable 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 if this information is not shown on the statements.
- Retirement, social security, IRA and pension withdrawals
- Self-employment or cash income
- Unemployment benefits
- Gambling income and records of losses
- Any forms you receive related to health insurance coverage

Possible deductions

- Mortgage interest statement(s). Did you refinance during the year? Bring in the closing paperwork.
- Property tax paid
- Sales tax deductions – save receipts for vehicle purchases and construction materials purchased for home improvements
- RTA tax paid with car registration (shown on the registration you got with your tabs)
- 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 1098T 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 will also 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!