

# WHAT TO BRING TO YOUR TAX APPOINTMENT

<b>ALL CLIENTS</b>	
<input type="checkbox"/> Proof of Health Insurance (Form 1095-A, -B, or -C)	<input type="checkbox"/> Real Estate Taxes (may be on 1098 form)
<input type="checkbox"/> All W-2, 1099 & 1098 forms	<input type="checkbox"/> Medical Expenses (out-of-pocket), if applicable
<input type="checkbox"/> Interest & Dividend Income (1099-INT, 1099-DIV)	<input type="checkbox"/> Sales Tax Paid (auto, boat, other big-ticket items)
<input type="checkbox"/> Pension & IRA/Retirement Income (1099-R)	<input type="checkbox"/> Work Related Expenses / Mileage Log
<input type="checkbox"/> Gambling Winnings (W-2 G FORM)& Losses	<input type="checkbox"/> Estimated Taxes Paid: Amounts/Dates Federal & State(s)
<input type="checkbox"/> Soc. Security / Unemployment (1099-SSA /1099-G)	<input type="checkbox"/> Purchase/Sell/Refinance Residence: Final Settlement Papers (HUD Papers) <i>for each transaction</i>
<input type="checkbox"/> Alimony Received or Paid ( <i>does not include child support</i> )	<input type="checkbox"/> Charitable Donations: Totals & Receipts
<input type="checkbox"/> State/Local Refunds or Amount Due-Payments Made for Prior Year	<input type="checkbox"/> Energy Tax Credits ( <i>\$500 Lifetime Limit</i> ) Receipts for: FURNACE • A/C • WINDOWS DOORS • INSULATION • WATER HEATER
<input type="checkbox"/> Partnership & S-Corp. Income (K-1 – <b>ALL PAGES</b> )	<input type="checkbox"/> NEW BABY: Original Soc. Sec. Card
<input type="checkbox"/> Stock Purchase & Sale Cost/Dates (Realized Gains Report)	<input type="checkbox"/> NEW SPOUSE: Original Soc. Sec. Card & Prior Year's Tax Return
<input type="checkbox"/> Education Expenses/Student Loan Interest (1098-T required for tax credits; 1098-Q)	<input type="checkbox"/> Driver's License (You, spouse)
<input type="checkbox"/> Legal Documents: Divorce, Adoption, Death, Trust	<b>NEW CLIENTS ONLY</b>
<input type="checkbox"/> Child Care Expenses: Provider Name, Address, SSN/EIN#, amount paid per provider <i>for each child</i>	<input type="checkbox"/> Prior Year's Tax Return(s)
<input type="checkbox"/> Personal Property Tax Paid on Vehicles, Boats, Trailers	<input type="checkbox"/> ALL Social Security Cards included on the return
<input type="checkbox"/> Mortgage Interest Paid (1098)	<input type="checkbox"/> Birthdate Info (you, spouse, dependents)



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