WHAT TO BRING CHECKLIST

PREPARING FOR YOUR APPOINTMENT: NEW & RETURNING CLIENTS

- ☐ Identification: Photo ID's, Birth Certificates, and Social Security cards for yourself, spouse and dependents
- ☐ (NEW CLIENTS ONLY) Last 3 years of tax returns, we will review them at no cost
- ☐ Wage Statements (**Form W2**) for yourself and spouse if filing jointly
- ☐ All other income statements: **Form 1099-R** (Retirement, pension and annuity income), **Form 1099-INT/DIV** (Interest and dividend income), **Form 1099-SSA** (Social Security Income), **Form 1099-G** (Unemployment Compensation), **Form 1099-B** (Stock & Bonds Income), **Form 1099-MISC** (Self-employed Income and other misc. income), **Form W-2G** (Gambling Winnings and Lottery or Gambling Losses)
- ☐ Form 1095- A, B, or C (Healthcare)

  1095-A- Insurance purchased from the HealthCare Market Place

  1095-B- Insurance by small corporate employers and Medicare

  1095-C- Insurance from large corporate employers
- ☐ Banking information for direct deposit or direct debit; name of bank, routing number, and account number. Can be provided with a voided check.
- ☐ Purchased or sold property? Bring in your HUD Statement and closing documents
- ☐ Paid for Child or dependent care? Name and address of provider, EIN# and total amount paid
- ☐ Receipts for Clothing and charitable donations
- ☐ Attended college? Bring in your 1098-T (Tuition Statement) and total of any other expenses paid
- ☐ Unreimbursed Employment-Related Expenses (Additional fees will be assessed if NOT totaled)

  Vehicle Mileage (not reimbursed by employer), Union & Professional Dues, Uniform and Uniform Maintenance, Protection Equipment, Travel from one jobsite to the next, Tools/ Equipment and Supplies, etc.
- ☐ Mortgage and Home Equity Loan Interest paid Form 1098
- ☐ Real Estate and property taxes paid if not on Form 1098
- ☐ Educator Expenses; Class supplies, ink/toner, snacks, seminars/workshops, etc.
- ☐ Student Loan Interest Form 1098-E
- ☐ Estimated taxes paid
- ☐ Income from Partnerships, S-Corps, Trust, and estates- Sch. K1
- ☐ Other State and Local Sales Taxes paid during filing year (not on W2)
- ☐ If you or spouse has a Foreign Bank Account, we may need to file FBAR-Federal Bank Account Reporting, please provide account information
- ☐ Alimony paid or received (with SS# of payor or recipient)

Providing these items on the list in a timely and organized manner will prevent multiple trips to our office making the process run smoothly and will keep your tax preparation fees to a minimum.