Items to bring to your Tax Appointment

Bring/mail PRINTED paper copies or original documents. Do NOT bring/mail a USB flash drive.

MUST HAVES:

- ❑ A printed copy of your most recent year's tax return. (New Clients Only)
- ❑ Direct Deposit Information - Bank name, routing, and account number (voided check)
- ❑ A copy of Taxpayer and spouse driver's license and Social Security Card.
- ❑ Copies of child/children's social security cards
- ❑ Children's date(s) of birth
- ❑ Proof of childcare expenses
- ❑ Year end statement of Proof of Health Insurance - 1095 A, 1095-B, or 1095-C
- ❑ ALL income statements including: W2 Forms, 1099 Misc Income, 1099 NEC Income
- ❑ 1099 R - Pension or Retirement Distributions
- ❑ 1099 G - Unemployment
- ❑ 1098 Int - Interest Income - anything over .50 cents has to be reported
- ❑ Student Loan Information
- ❑ Social Security Statements
- ❑ Divorce and/or Separation Agreement and/or Custody Decrees or Power of Attorney
- ❑ Sales of Stocks or Bonds - buy date and cost basis, sale date, and sale price
- ❑ Closing Statements from refinance from home and home bought or sold
- ❑ Mortgage interests statements from first and/or second mortgages and home equity loans
- ❑ Sales tax paid to treasury office
- ❑ Property taxes paid on land and homes
- ❑ County portions of anything you put license plates on
- ❑ Paid Medical Bills - doctor, dentists, chiro, eye care, RX, medical ins, health ins
- ❑ Medical Miles
- ❑ Contributions to Non-profit organizations. Please include any charity miles.
- ❑ Sales Tax on large purchases - cars, boats, furniture, home improvement, etc.
- ❑ Energy Credit receipts - appliances, windows, solar panels, siding, etc.
- ❑ Pay stubs - the last one of the year and any other if you have them.