

Things to Bring when Visiting a Tax Professional

All Individuals:

1. Prior year tax return(s), if possible
2. Social security cards
3. Photo identification – government issued, NOT expired

Children/dependents

4. Social security cards
5. Child care information (name, SSN or EIN number, address, amount paid – summary bill from provider)
6. If college age, Form 1098-T from college/university (educational expenses)

Employment and Income Information

7. W2 forms from ALL jobs
8. 1099-MISC from all jobs where you were an independent contractor
9. 1099-G from all states where you received unemployment
10. 1099-R from all sources of pensions, annuities, retirement
11. W2-G issued for gambling winnings
12. K-1 for all sources of income from partnerships, S-Corps, trusts or estates

Investment Income

13. Interest Income (1099-INT)
14. Dividend Income (1099-DIV)
15. Sale of Stock (1099-B)
16. Sale of real estate (1099-S)
17. Rental income and expenses, including depreciation

Adjustments to Income

18. Educator expenses
19. Health Savings Account (HAS)
20. Moving Expenses
21. Alimony paid – will need SSN of recipient
22. IRA contributions
23. Student Loan Interest paid
24. 1098-T: Tuition paid if YOU or your spouse were students in higher education

Do You Itemize?

25. Total out-of-pocket medical expenses if you think they will exceed 7.5% of your adjusted gross income
26. Own a home? We'll need 1098 mortgage interest statements
27. Real Estate taxes paid for all real estate you own
28. Personal property taxes – bring your vehicle registration(s)
29. Charitable contributions – Cash donations and non-cash donations – bring your records
30. Job expenses – bring receipts for tools, uniforms, equipment, supplies, log book for business mileage, etc
31. Safety deposit box fees, investment expenses

Office in the Home

32. Square footage of home and office space used
33. Bring total spent for utility bills, HOA dues, rent payment or mortgage interest information