

CHECK LIST OF WHAT TO BRING TO TAX APPOINTMENT

Your specific paperwork certainly depends on your filing status and occupation, but this list will help to get you started.

Personal Data

- Social security numbers (including spouse and children)
- Child care provider tax ID or SSN and address

Home and Rental Property Data

- Mortgage interest (from 1098)
- Home equity loan interest
- Real estate taxes paid
- Sale of your home or other real estate (form 1099-S)
- Rental Property income and expenses

Income Data

- W-2 Forms
- Pensions and annuities documentation (1099-R)
- Partnership and trust income
- Jury Duty Pay
- Alimony Received
- State and local income tax refund
- Scholarships and fellowships
- Prizes and awards
- Gambling and lottery winnings

Financial Assets and Liabilities

- Interest income statements (form 1099-INT & 1099-OID)
- Dividend income statements (form 1099-DN)
- Tax refunds and unemployment compensation (form 1099-G)
- Proceeds from broker transactions (form 1099-B)
- Miscellaneous income (form 1099-MISC)
- Retirement plan distribution (form 1099-R)
- Student loan interest paid (1099-E)
- Early withdrawal penalties on CD's

Self-Employment Data

- K-1's on all partnerships
- Receipts and documentation for all business related expenses
- Auto mileage log
- Home office square footage

Expense Documentation

- Charitable donations
- Unreimbursed business or volunteer work expenses
- Child care expenses (include the address, phone, and Tax ID of child care provider)
- Alimony paid
- Tax Return preparation fees
- Investment expenses
- Education expenses (1098-T)
- Job-hunting expenses
- Moving expenses
- Medical expenses

Deductions

- IRA, SEP, SIMPLE and other retirement plan contributions
- Casualty and theft losses
- Medical savings accounts
- Energy Credit Expenditures