



Below is a list of items you will need to bring to your appointment if applies to you

- Driver's License(s)
- Social Security card(s)
- Dependents' Social Security Card and Birth Certificate
- Child care expenses and provider information
- Wage Statements/W2s
- Self-employment business income and expenses/1099-MISC
- Form 1095-A Marketplace Health Insurance
- Form 1099-R Retirement Income
- Form RRB-1099 Railroad Retirement
- Form 1099-G Unemployment income
- Form 1099-C Canceled Debt Amount
- Form SSA-1099 Social Security income
- Form 1099-G State refund amount
- Form 1098 Mortgage or home equity loan interest paid
- Form 1099-INT Interest
- Form 1099-DIV Dividend income
- Form 1098-T Tuition & Fees
- Form 1098-E Student loan interest
- Educator expenses (\$250.00 Maximum)
- IRA contributions
- Statements on the sales of stocks or bonds/1099-B
- Lottery or gambling winnings/losses
- Income and expenses from Rentals
- Alimony paid or received
- Record of Purchase or Sale of Residence
- Medical and Dental Expenses
- Real estate and Personal Property taxes
- Estimated taxes or foreign taxes paid
- Cash and non-cash charitable donations

- Unreimbursed employment-related expenses
- Casualty or theft losses
- Prior Year Federal and State tax return (New Clients Only)\*