



## What to Bring to Your Appointment

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|--|---|
| <input type="checkbox"/> Social Security card(s)                                       | <input type="checkbox"/> Alimony paid or received*                        |
| <input type="checkbox"/> Driver's License(s)   | <input type="checkbox"/> Record of purchase or sale of residence*         |
| <input type="checkbox"/> Dependants' Social Security numbers and dates of birth*       | <input type="checkbox"/> Medical and dental expenses*                     |
| <input type="checkbox"/> Wage statements   | <input type="checkbox"/> Real estate and personal property taxes*         |
| <input type="checkbox"/> W-2s  | <input type="checkbox"/> State or local taxes paid                        |
| <input type="checkbox"/> Last year's Federal and State tax return                      | <input type="checkbox"/> Estimated taxes or foreign taxes paid*           |
| <input type="checkbox"/> Self-employment business income and expenses/1099-MISC*/1099K | <input type="checkbox"/> Cash and non-cash charitable donations*          |
| <input type="checkbox"/> Commissions received/paid*                                    | <input type="checkbox"/> Mortgage or home equity loan interest paid/1098* |
| <input type="checkbox"/> Pension, retirement income/1099-R*                            | <input type="checkbox"/> Unreimbursed employment-related expenses*        |
| <input type="checkbox"/> Unemployment income/1099-G*                                   | <input type="checkbox"/> Job-related educational expenses*                |
| <input type="checkbox"/> Canceled Debt Amount/1099-C*                                  | <input type="checkbox"/> Educator expenses*                               |
| <input type="checkbox"/> Social Security income/SSA-1099*                              | <input type="checkbox"/> Tuition and Education Fees/1098-T*               |
| <input type="checkbox"/> IRA contributions*  | <input type="checkbox"/> Student loan interest/1098-E*                    |
| <input type="checkbox"/> Statements on the sales of stocks or bonds/1099-B *           | <input type="checkbox"/> Moving expenses*                                 |
| <input type="checkbox"/> Interest and dividend income/1099-INT/1099-DIV*               | <input type="checkbox"/> Casualty or theft losses*                        |
| <input type="checkbox"/> Lottery or gambling winnings/losses*                          | <input type="checkbox"/> Child care expenses and provider information*    |
| <input type="checkbox"/> State refund amount/1099-G*                                   | <input type="checkbox"/> Medical insurance verification                   |
| <input type="checkbox"/> Income and expenses from rentals*                             |   |

\* If Applicable