



**Below you will find a list of items you will need to bring to your appointment.**

- Driver's License(s)
- Social Security Card(s)
- Dependents' Social Security Card and Birth Certificate
  - Child Care Expenses and Provider Information
  - Wage Statements/W2's
- Self-Employment Business Income and Expenses/ 1099-MISC
- Form 1099-K Payment Card and Third-Party Network Transactions
  - 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 (\$300.00) Maximum
    - IRA Contributions
- Statements on the sales of stocks or bonds/ 1099-B
- Form W2G 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)