

REMINDER/CHECKLIST FOR DOCUMENTS TO REMEMBER TO BRING

- ➔ **Driver's license** current copies of BOTH taxpayer and spouse
- ➔ **SS cards** copies for everyone on tax return ONLY if we don't already have them
- ➔ **All W-2** forms for wages earned as an employee
- ➔ **W-2G** forms for gambling winnings
- ➔ **SSA-1099 and 1099-R** forms for Social Security and retirement income
- ➔ **1099-INT, 1099-DIV, 1099-B** forms for bank and investment accounts
- ➔ Itemized deductions if you expect to itemize (see our website organizers)
- ➔ Bring proof of charity contributions (if you don't itemize, anything over \$500 may be deductible on Colorado)
- ➔ Childcare expenses (see our website organizers)
- ➔ College Tuition Form 1098-T and proof of payment (see our website organizers)
- ➔ Bought/sold a home or refinanced, send all settlement statements
- ➔ Self-employment income and expense totals (see our website organizers)
- ➔ Farm income and expense totals (see our website organizers)
- ➔ **BRING ANY TAX FORM THAT SAYS "IMPORTANT TAX DOCUMENT"**
- ➔ Use the remaining space for any notes or question you may have