

## WHAT TO BRING TO YOUR TAX APPOINTMENT    Carol's Tax Service Butte, MT caroltax.com

### New Clients:

- Social Security cards for you, your spouse and all dependents
- Valid picture ID
- Dependent's birth dates
- Last year's return
- Plus, everything below

### Returning Clients:

- Valid picture ID, if changed from last year
- Completed checklist and engagement letter
- All tax forms need to complete your return, including W2's, 1099's, 1098's, 1095's, etc
- Information about any other income you may have received during the year
- If you received unemployment, you would need your 1099G
- Checking or Savings routing and account numbers for direct deposit/debit
- MT taxpayers over age 62, property tax receipts or rent receipt.

### Deductible Items:

- Teachers, amount you paid for expenses for your classroom (up to \$300)
- Student Loan interest forms
- Amounts paid for child and dependent care expenses (**Daycare**). Provider's name, address, and Fed ID.
- Amounts paid for Higher Education for anyone on the return. Please provide the 1098T, book and supply expenses
- Home improvements (energy saving) Insulation, windows, doors, heaters, etc. We need a certificate indicating that it qualifies for the credit. Ask the contractor for information.
- 1095 If you purchased **marketplace** health insurance.
- HSA, MSA, Montana Medical Savings Account Info. **For MT Med Savings acct we need beginning and ending balances.**
- Unreimbursed medical and dental expenses and miles driven for medical. Totals not receipts.
- Charitable contributions. A total for donated items and a total for money donated.
- Mortgage statement from the bank.
- Real estate taxes paid. The tax form or receipts from the courthouse.
- Vehicle taxes paid. A total or receipts from the courthouse.

### BUSINESS

- Last 2 years tax returns.
- Income and expenses, Loan documents, Assets purchased, Vehicle Form for mileage and auto expenses, ETC.
- Tax Return Preparations fees for last year