

WHAT TO BRING TO YOUR TAX APPOINTMENT

For fast and accurate service, please bring the following items to have your taxes prepared:

- Valid picture ID
- Completed checklist and engagement letter
- Social Security cards for you, your spouse and all dependents
- All tax forms received, including W2's, 1099's, 1098's and 1095's
- Information about any other income you may have received during the year
- If you received unemployment, you would need your 1099G
- Last year's return
- Checking and 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
- Amounts paid for child and dependent care expenses. Names, addresses and SS# or Fed ID #
- Amounts paid for Higher Education for anyone on the return. Please provide the 1098T
- Home improvements (energy saving)
- Health ins costs, HSA, MSA, MT MED Account info
- Unreimbursed medical and dental expenses and miles driven for medical
- Charitable contributions
- Tax Return Preparations fees for last year
- Mortgage interest paid
- Real estate taxes paid
- Vehicle taxes paid

BUSINESS INCOME AND EXPENSES, LOAN DOCUMENTS, ASSETS PURCHASED, ETC.