

ITEMS TO BRING TO YOUR TAX APPOINTMENT

Names, birth dates, and social security numbers for yourself, spouse and all dependents if you are a new client or if dependents are not in our computer system.

- All sources of income (W-2's, or 1099's, including dividends)
- Stock information (bought & sold)
- Mortgage interest statement (1098's)
- Taxes paid on home mortgage
- Donation receipts (cash & non-cash, i.e. clothes, furniture, etc.)
- Education credit expenses
- Childcare expenses (including care providers SS#, or employer ETD#)
- Bank account information (account number & routing number)
- Escrow papers (if you bought, sold or refinanced your home during the tax year)
- Car license fees (if you itemize on the long form)
- Union dues (if you itemize)
- Bill of Sale (if you bought a boat, car, motorcycle, motor-home, or other special item)
- Employee business expenses (any receipts if you bought anything for work, if you itemize)
- Office-in-home expenses (total sq feet of home, utilities, insurance, and other expenses)
- Rental income & expenses
- Estimated taxes paid during the tax year including the January installment

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