

What to Bring:

- ✓ Last year's tax return
- ✓ Driver's License (front and back if copy) for anyone listed as a Taxpayer or Spouse (including dependent children who are filing their own return)
- ✓ Banking Information (Routing and Account Number)
- ✓ Dependents social security cards and birth certificates
- ✓ Wage statement - W-2
- ✓ Retirement income from pension or IRA - 1099-R
- ✓ Out of pocket IRA contributions
- ✓ Social security statement - 1099-SSA
- ✓ Unemployment compensation - 1099-G
- ✓ Interest and dividend statements - 1099-INT/1099-DIV
- ✓ Sales of stocks and bonds - 1099-B
- ✓ Self-employment income and expenses - 1099-NEC
- ✓ Rents and/or commissions - 1099-MISC
- ✓ Rental property income and expenses
- ✓ Lottery and gambling winnings and losses - W2-G
- ✓ Income from partnerships, corporations, estates, and/or trusts - K-1
- ✓ Alimony paid or received (only for divorce decrees in place before 12/31/2018)
- ✓ Mortgage and/or home equity loan interest – 1098
- ✓ Closing Disclosure from Purchase and/or Sale of any Homes/Land in tax year.
- ✓ Real estate or personal property taxes paid
- ✓ Medical and dental expenses
- ✓ Unreimbursed work expenses and mileage (for State purposes only)
- ✓ Gifts to charity by cash and/or check as well as goods
- ✓ Education expenses - 1098-T or 1099-Q
- ✓ Student Loan Interest Paid – 1098-E
- ✓ Educational savings contributions - NY529 Plans
- ✓ Childcare expenses and provider information
- ✓ Estimated federal and state taxes paid
- ✓ 1095-A statement for healthcare if purchased through the marketplace
- ✓ New Car Purchase with loan acquired after 12/31/24 loan interest paid