What to Bring to your Tax Appointment

* This is not an exhaustive list, but a guide some examples that my apply to your situation*

Personal documents

Bring all documents below.

- Photo ID (drivers license or passport, must be a government issued ID)
- Social Security Cards, Social Security Number verification letters, or Individual Taxpayer Identification Number assignment letters for you, your spouse, and any dependents
- Birthdates for you, your spouse, and dependents on the tax return
- Bank account and routing number or a voided check for direct deposit of your refund. This is important to ensure your refund is sent to you, if you are entitled to one.

Income

Bring all documents that apply. If you did not receive all of the forms listed, they may not apply to you.

- Employment Income
  - W-2 form(s) for all jobs last year (your employer(s) will have sent you this by January 31st)
- Self-Employment Income
  - 1099-MISC and/or 1099-K
  - Records of income not reported on 1099 forms
  - Records of expenses including receipts, credit statements, etc.
  - Record of estimated tax payments
- Retirement Income
  - SSA-1099 form for Social Security benefits
  - 1099-R for pension/IRA/annuity income
- Other sources of income
  - 1099-G for refund of state/local income taxes
  - 1098-T for scholarships/fellowships
  - 1099-R for disability income
  - Income or loss from the sale of stocks, bonds, or real estate
  - Income or loss from rental property
  - Alimony received
  - Statements for prizes or lottery/gambling winnings
  - Interest and dividend statements from banks
  - Records for any other income
- **Expenses**
  - You may be able to claim tax deductions for some of the expenses you have. These deductions reduce the income you are taxed on. Bring documentation for all of the following expenses you have.

- Retirement contributions, including a 401(k) or IRA
- State and local taxes you've paid
- Mortgage statements and property tax bills if you are a homeowner
- College tuition (1098-T) and student loan statements (Form 1098-E) *you can get these forms from the college/university attended or your loan servicer*
- Childcare expenses, including provider's address and federal tax ID number
- Receipts for charitable donations
- Medical and dental bills
- Records for supplies used as an educator
- Uniforms, union dues/expenses, dues to professional societies,
- Licenses and regulatory fees
- Charitable donations, cash and non-cash (clothing, furniture, vehicles)

- **Additional Items**
  - Last year's tax return if available
  - Proof of health insurance or exemption: Form 1095-A if you had coverage through the Health Insurance Marketplace, Form 1095-B/1095-C if you had other kinds of insurance, or a Health Insurance Exemption Certificate, if received
  - Tax notices: Documents from the IRS, Health Insurance Marketplace, your state tax agency, or anything that says "IMPORTANT TAX DOCUMENT"