

What You Should Bring To Your Tax Appointment

Your Tax Return from last year
Wage Statements (W-2's)
Pension and Retirement Income (1099-R's)
Interest and Dividend Income (1099 INT and 1099 DIV)
Self-Employed Business Income and Expenses
Lottery or Gambling Winnings and Losses
State Refund Amount
Social Security Income
Rental Property Income and Expenses
Rental Property Depreciation Schedules
Alimony Paid or Received
Purchase/Sale of Residence Records
Medical and Dental Expenses
Taxes Paid (Property Taxes Paid, Vehicle License Fees)
Charitable Donations
IRA Contributions
Work Related Expenses
Education Expenses for Taxpayer and Dependents
Child Care Expenses and Provider Information