

THINGS TO BRING TO A TAX APPOINTMENT (CHECKLIST)

Personal Documents

- Photo ID (For you and your spouse)
- Social Security Cards or ITIN Letter
- Birth dates for you, your spouse, and dependents you are claiming.
- Bank account and routing number
- 2020/2021 tax returns
- Identity Protection PIN (IP PIN), if you have one.

Income

- W-2 form(s) for all your jobs from 2022.

Self-Employment Income

- 1099 NEC and/or 1099 MISC
- P&L Statement (I can help you with this, $\text{Income} - \text{Expenses} = \text{Net Income}$)
- Record of estimated tax payments
- EIN
- Business Name(s)
- Business Vehicle Information: Mileage and/or Expenses

Retirement or Disability Benefits

- SSA-1099 form for Social Security benefits
- 1099-R for pension

Unemployment Income

- 1099-G for unemployment benefits

Rental

- Rental Address
- Rental Income Amounts
- Rental Expenses
 - Mortgage Interest and Property Tax Statement

Other sources of Income

- 1099-G for state refund
- 1098-T for scholarships
- 1099-INT/1099-DIV for Interest and dividend statements from banks

Expenses

- Medical and dental bills
- DMV Registration
- Mortgage statements and Property tax bills
- College Tuition (Form 1098-T) and student loan statements (Form 1098-E)
- Childcare expenses
- Receipts for charitable donations
- Educator expenses (School Supplies)

Other Tax Documents or Notices

- 1095-A for Health Insurance Marketplace
