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Individual Taxes

Items to bring with you for your tax appointment

(Note that not all of these may apply.)

INCOME

- LAST YEAR'S tax return not prepared in our office – Federal, State and Local
- W-2's
- 1099's for Interest and Dividends
- 1099 B's or year end investment statements
- Stock/Bond transaction information if not included on year end 1099B
- Information about any refunds from the State or Local government regarding overpayment of prior year taxes
- IRA, Pension or retirement distribution information – may be on a 1099R
- IRA Rollover/conversion information

ITEMIZED DEDUCTION INFORMATION

- Medical costs – only required if significant. Must meet minimum of 7.5% of your AGI.
- Tax payments to State or Local governments – may include income, per capita, LST, or estimated payments made for during the year to any state, city or municipality
- Real Estate Taxes
- Mortgage interest.
- Mortgage insurance
- Charitable Contributions – cash and non cash. Summarized by charity name.

CREDIT INFORMATION

- Child Care Information including name, address, phone number, EIN and Amount paid.
- Residential Energy Credit Applicable Purchases
- Education Credit Information – Tuition
- **ANY ESTIMATED TAX PAYMENTS SENT IN DURING THE YEAR**