**WHAT TO BRING IN FOR TAXES**

* Contact Info (phone & email)
* Name, birthday & Social Security # for **each person** on tax return
* Driver’s License Info (state, number, issue date, expiration date)
* Copy of last year’s taxes (only if we haven’t done yours before)
* Any estimated tax payments made in previous year
* All W2’s
* Mortgage statements (1098)
* Real Estate Taxes paid (if bank doesn’t pay them)
* Records of donations (all donation slips must be filled out)
* Investment and Stock Account Statements
* Any other relevant tax documents (1099s, 1098Ts, etc.)

**IF YOU HAVE A BUSINESS…**

* Income & Expenses for previous year

**IF YOU HAVE A RENTAL…**

* Rental property income and expenses for previous year