

Personal Information

All clients must bring:

government issued photo ID's (both partners);
social security cards for any new dependents;
bank account information for direct deposit of your refund - if we don't have it.

All *new* clients must also bring:

a copy of last year's tax returns
Social security cards for everyone on the return

If you are divorced, then bring:

- Alimony Received info and/or Alimony Paid (along with ex-spouse's social security number)
A copy of any divorce or separation agreement
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If you worked for someone else, then bring:

- Forms W-2 and/or 1099-MISC for all employers where you or your spouse worked during the year.

If you had investment income, then bring:

- Interest income – Form 1099-INT
- Dividend income – Form 1099-DIV
- Proceeds from the sale of stocks, bonds, etc. – Form 1099-B
- Any other documents relating to the sale of assets, and the purchase of those assets
- Schedule(s) K-1

If you have other income, then bring:

- Form 1099-R for payments from IRAs or retirement plans (ex. 401 k withdrawals or pensions).
 - If you received a distribution from an IRA account, the most-recently filed Form 8606 (if you made contributions in prior years to IRAs that weren't deductible on your income tax return)
 - Your social security statement Form SSA 1099
 - Gambling income (and proof of losses)
 - Pension Letter
 - Unemployment Income - 1099-G
 - Other documents, if any, that show the income
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If you have business income, then bring:

Profit and loss statement and balance sheet for every business;
Schedule(s) K-1

If you own rental property, then bring:

- Profit and loss statements, OR all of the below:
 - Checkbook or cancelled checks for expenses
 - Form 1099-MISC or other records for rental income paid to you
 - Mortgage interest reported on Form 1098
 - Property tax payments from assessor's bill or cancelled checks
 - Proof of other expenses
 - Rental Payments received
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Deductions

IRA Contributions –the total amount contributed for the current tax year

Energy Credits

- Form 5695 for residential energy credits
- Receipts for adding insulation, energy efficient exterior windows, energy-efficient heating and air conditioning systems, solar hot water heaters, geothermal heat pumps, and wind turbines

Student Loan Interest

- Form 1098-E showing interest paid

Education Costs

- Receipts for tuition (or cancelled checks) for post-high school education
- Tuition statement ([Form 1098-T](#))

Educator Expenses (for teachers K-12)

- Cancelled checks or receipts for expenses paid for classroom supplies.

Medical Savings Account Contributions

- Account statements or
- Cancelled checks

Medical and Dental Expenses

- There are many things to consider when tallying up your medical and dental expenses for the year:
 - Do you have medical aids?
 - Did you need hospital care?
 - Did you spend money for medicines and drugs?
 - Did you have nursing home expenses or nursing care?
 - Did you have transportation costs for obtaining medical care?

Moving Expenses

- Invoices from moving companies, lodging during the move and storage facilities; and
- Paycheck stub for moving expense reimbursements

Self-employed Health Insurance (if applicable)

- Insurance premium bills, or

- Cancelled checks

Keogh, SEP, SIMPLE and Other Self-employed Pension Plans

- Year-end account summary

Child Care Costs

- Amount paid
- Child care provider's name, address and telephone number
- Provider's tax ID or Social Security number

Interest You Paid

- Form 1098 (mortgage interest paid)

Charitable Donations

-Cash donations:

- Charity bills, receipts or cancelled checks
- Records of the mileage incurred for charitable purposes

-Donations of property:

- Receipts from a charitable agency

Casualty and Theft Losses

- Description of property damaged or stolen
- Receipts or cancelled checks showing cost of property
- Insurance policy and insurance reports showing reimbursement
- Appraisal fees, if applicable

Other Miscellaneous Tax Deductions

- Reimbursement check stubs or reports from your employer
- Union dues – paycheck stub for automatic withdrawals
- Gifts to clients, etc. – receipts showing date, cost and description
- Supplies – receipts or bills
- Property purchased for use in your work – invoices, receipts
- Uniform and special clothing costs – bills or paycheck stubs showing deductions

Job Expenses Seminar fees – receipts or invoices

- Professional publications and books – receipts or invoices
- Receipts for small tools and supplies you purchased
- Uniforms

Job travel information:

- Invoices, receipts or ticket stubs for transportation
- Mileage records per vehicle used
- Hotel & restaurant receipts
- Parking fee receipts

Taxes You Have Paid

Real Estate Taxes

- Tax collector bills or cancelled checks
- Form 1098 and HUD-1 or HUD-1A (the closing statement) if you bought, sold or refinanced property in the current tax year

Other tax payments

If you paid quarterly estimated tax payments (usually paid by self-employed workers), you'll need:

- Records showing the date paid and amount

Misc. Taxes Paid

- Foreign Taxes Paid
- Personal Property Taxes

- Sales Tax on "big ticket" items, e.g. autos, RV's, Boats, etc.