



# What To Bring

## PERSONAL INFORMATION FOR EACH PERSON ON TAX RETURN

- Prior year tax return
- Social Security Cards
- Valid driver license or government ID card
- Health insurance information

## INCOME

- W-2's
- Interest/Dividend Statement (1099-INT/DIV or substitute)
- Stock Sales (1099-B or Brokerage statement)
- Self-employment Information
  - Income (1099-Misc or list)/Expenses (Receipts or list)
  - Sale or purchase of any assets (List/Receipt for big ticket purchases)
- Sale of Personal Residence
  - Closing documents
  - 1099-S
- Rental Information
  - Income/Expenses
  - Improvements
- Gambling Winnings/losses
- State Income Tax refund from prior year (1099-G)
- Pension/Retirement Income (1099-R)
- Social Security/Railroad Income
- Unemployment Compensation

## Deductions/Adjustments

- Medical expenses
- Real Estate taxes
- Personal property taxes (vehicle registration cards)
- Mortgage Interest
- Charitable Contributions
- Moving expenses
- IRA Contributions

## Tax Credits

- Education expenses
- Child care information (Address/Social Security number or EIN)
- Adoption Expenses