



What To Bring To Your Tax Appointment

Personal Taxes

- **Personal & Dependent Information**
 - Driver's License(s) & Social Security card(s)
 - Dependent's Social Security cards and birth dates
- **Income**
 - Wage statements/W-2s
 - Self-employment business income and expenses and vehicle mileage/1099-MISC and income records to verify amounts
 - Pension, retirement income/1099-R
 - Unemployment income/1099-G
 - Social Security income/SSA-1099/RRB-1099
 - Commissions received/paid/1099's
 - Statements on the sales of stocks or bonds/1099-B
 - Interest and dividend income/1099-INT/1099-DIV/1099-OID
 - Lottery or gambling winnings/losses/W2-g
 - State refund amount/1099-G
 - Alimony paid or received and ex-spouse info
 - Income and expenses from rental properties
- **Deductions**
 - Form 1098 Mortgage or home equity loan interest
 - Real estate and personal property taxes
 - Child care expenses and provider information (Federal ID Number)
 - Medical and dental expenses (also miles)
 - Cash and non-cash charitable donations
 - Home purchase closing statement/HUD
 - Casualty or theft losses
 - IRA contributions/Form 5498
 - State or local taxes paid
 - Estimated taxes or foreign taxes paid
 - Car purchase paperwork showing sales tax
 - Record of purchase or sale of your house
 - Unreimbursed job related expenses
 - Educator expenses
 - Tuition and Education Fees/1098-T
 - Student loan interest/1098-E
- **Miscellaneous Items**
 - Last year's Federal and State tax return
 - 1095-A* If purchased health insurance through the Health Insurance Marketplace
 - Canceled Debt Amount/1099-C

Business/Corporate Taxes

- **Quickbooks File Backup (If Applicable)**
- **Income (Totaled)**
 - Gross receipts from sales or services
 - Refunds>Returns
 - Business checking/savings account interest (1099-INT or statement)
 - Other income
- **Inventory (if applicable)**
 - Beginning inventory
 - Inventory purchases
 - Ending inventory
- **Expenses (Totaled by Category) Examples:**
 - Advertising
 - Automobile Expenses
 - Gas, Repairs, Etc.
 - Mileage Driven
 - Insurance
 - Automobile
 - Liability
 - Business
 - Errors & Omissions
 - Workers Comp
 - Travel expenses (Hotel, Airfare, Taxi, etc...)
 - Parking and tolls
 - Meals and Entertainment
 - Internet connection (hotel, Internet café etc.)
 - Legal Fees
 - Office Supplies
 - Rent Expense
 - Any Other Expenses, etc.
- **Employee & Subcontractor payments**
 - 1099's-MISC and 1096
 - W3/W2's from Payroll Company
 - Federal and state payroll returns (Form 941's, 940, UCT6's, etc.)
- **Assets & Equipment**
 - Cost and acquisition date of assets
 - Sales price and disposition date of any assets sold
- **Interest expense**
 - Mortgage interest on building owned by business
 - Business loan interest
 - Auto Loan Interest
 - Business Equipment Loans
- **Miscellaneous Items**
 - Last year's Federal and State tax return