## 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-QID
  - 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

Rev. 1/20/2015