

What Do I need to Bring to My Tax Appointment?

My Check List:

Personal Information:

- Your social security number
- Your spouse's full name & social security number
- Your Drivers License
- Amount of any alimony paid and ex-spouse's social security number
- Add your 2016 and 2015 tax return(s). Your tax professional can check them for accuracy.
- Personal Preparation Tax Letter signed by you and spouse.
- Completed Tax organizer (short form, or long form – if you itemize)

Employee Information:

- Forms W-2

Other People who may belong on your return:

- Dates of birth and social security numbers
- Childcare records (including the provider's ID number) if applicable
- Approximate income of other adults in your home (not spouse, if you're filing jointly)
- Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you.

IRA Information:

- Amount contributed for 2017
- Traditional IRA basis
- Value of IRAs on Dec 31, 2016

Rental Income:

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation

Other Income:

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099

Education Payments:

- Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid
- Forms 1098-T and 109-E, if you received them
- Scholarship and fellowships

Savings and Investments:

- Interest dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)

- Dates of acquisition and records of your cost or other basis in property you sold

Itemizing Deductions:

- Form 1098 or other mortgage statements
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Invoice showing amount of vehicle sales tax paid
- HUD statement showing closing date of home purchase
- Cash amounts donated to houses of worship, schools, and other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of your 2017 tax return (new clients only)
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses

Vehicle Information:

- Total miles driven for the year (or beginning/ending odometer readings)
- Total business miles driven for the year (other than commuting)
- Amount of parking and tolls paid
- If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Self-Employment Information:

- Form 1099-Misc, Schedules K-1, income records to verify amounts not reported on 1099's
- Records of all expenses – check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

Retirement Income

- Pension/IRA/annuity income (1099-R)
- Social security/RRB income (1099-SSA, RRB-1099)