

What you should bring to your appointment

The Basics

- All W-2s
- Social Security card(s)
- Social Security numbers and birth dates of dependents
- Last year's Federal and State tax returns (new customers only)

Real Estate

- Real estate taxes paid
- Personal property taxes paid
- Mortgage or home equity loan interest paid / 1098
- Record of new home purchase or sale
- Rental income and expenses
- Repayment of the First-Time Homebuyer Credit/form 5405

State & Local Taxes

- State or local taxes paid
- State refund amount / 1099-G
- Estimated taxes or foreign taxes paid

Income Sources

- Self-employed business income and expenses / 1099-MISC
- Commissions you received or paid
- Pension or retirement income / 1099-R
- Unemployment income / 1099-G
- Social Security Income / SSA-1099
- Alimony paid or received
- Lottery or gambling winnings/losses (If you itemize, even if you have winnings, losses may be listed on Schedule A in your favor)

Savings & Investments

- IRA contributions
- Interest and dividend income / 1099-INT or 1099-DIV
- Statements on stock or bond sales / 1099-B
- HSA Contribution
- HSA/MSA Distribution/Form 1099-SA

Family

- Medical and dental expenses
- Child care expenses and provider information
- Mileage records to doctor appointments

Work Expenses (Unreimbursed)

- Uniforms, union dues/expenses, dues to professional societies, licenses and regulatory fees, subscriptions to professional journals/trade magazines, tools/supplies used in your work, occupational taxes, passport for a business trip, travel, transportation, meals, entertainment, gifts and local lodging related to your work.
- Job-related educational expenses

Education Expenses (Unreimbursed)

- Classroom expenses for teachers
- Tuition, books, supplies/equipment needed for a course of study, notebooks, ebooks, education fees, non-academic fees, student activity fees, athletic fees.
- Student loan interest / 1098-E

Other

- Charitable donations, cash and non-cash
- Casualty or theft losses
- Mileage records for travel to and from Goodwill, Salvation Army, charity events, volunteer work, etc.