

What to bring to your appointment

Personal Information

- Your social security number and date of birth
- Your spouse's full name, social security number and date of birth

Other people who may belong on your return

- Dates of birth and social security numbers
- Childcare records (including the provider's ID number and address) if applicable
- 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

Stimulus Payments

- Documentation showing the amount received for both the first and second stimulus payments

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 1098-E, if you received them
- Scholarships and fellowships

Employee Information

- Forms W-2
- Forms 1099

Self-Employment Information

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Dollar amount totals and records for all categories of expenses related to the business
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, **if applicable** Vehicle Information & mileage log
- 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 qualify to claim actual expenses bring totals for gas receipts, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Income

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

Retirement Income

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

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

Other Income

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

Itemizing Deductions

- Forms 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 sales tax paid on a vehicle purchase or any other big ticket items
- HUD statement (settlement statement) showing closing date of home purchase and or sale

- Receipts for cash amounts donated to houses of worship, schools, and other charitable organizations, any donation over \$25 must have a receipt
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes

IRA Information

- Amount contributed for the current tax year (and the following, if applicable)
- Traditional IRA basis
- Value of IRAs at year end

If you were affected by a federally declared disaster

- City/county you lived/worked/had property in
- Records to support property losses (appraisal, clean-up costs, etc.)
- • Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid
- FEMA assistance information