



## What to Bring to Your Appointment

- ☐ Social Security card(s)
- ☐ Driver's License(s)
- ☐ Dependents' Social Security numbers and dates of birth\*
- ☐ Wage statements
- ☐ W-2s
- ☐ Last year's Federal and State tax return
- ☐ Self-employment business income and expenses/1099-MISC\*/1099K
- ☐ Commissions received/paid\*
- ☐ Pension, retirement income/1099-R\*
- ☐ Unemployment income/1099-G\*
- ☐ Canceled Debt Amount/1099-C\*
- ☐ Social Security income/SSA-1099\*
- ☐ IRA contributions\*
- ☐ Statements on the sales of stocks or bonds/1099-B \*
- ☐ Interest and dividend income/1099-INT/1099-DIV\*
- ☐ Lottery or gambling winnings/losses\*
- ☐ State refund amount/1099-G\*
- ☐ Income and expenses from rentals\*
- ☐ Alimony paid or received\*
- ☐ Record of purchase or sale of residence\*
- ☐ Medical and dental expenses\*
- ☐ Real estate and personal property taxes\*
- ☐ State or local taxes paid
- ☐ Sales tax paid\*\*
- ☐ Estimated taxes or foreign taxes paid\*
- ☐ Cash and non-cash charitable donations\*
- ☐ Mortgage or home equity loan interest paid/1098\*
- ☐ Unreimbursed employment-related expenses\*
- ☐ Job-related educational expenses\*
- ☐ Educator expenses\*\*
- ☐ Tuition and Education Fees/1098-T\*\*
- ☐ Student loan interest/1098-E\*
- ☐ Moving expenses\*
- ☐ Casualty or theft losses\*
- ☐ Child care expenses and provider information\*
- ☐ Receipt(s) for qualified energy efficient home improvements\*\*

\* If Applicable

\*\* Provision has expired. May be extended by Congress.  
Bring just in case.