



What to Bring to file your Taxes

If available, bring the applicable items from this list to your tax interview to help us prepare a tax return that results in the largest allowable refund for you.

- Social Security Card(s)
- Driver's License(s)
- Dependants Social Security Numbers & Dates of Birth
- Last Year's Federal and State Tax Returns
- Wage Statements - Form W-2
- Pension or Retirement Income - Form 1099-R
- Interest and Dividend Income - Form 1099-INT/ Form 1099 - DIV
- State Income Tax Refund Amount - Form 1099-G
- Social Security Income - Form SSA - 1099
- Unemployment Income - Form 1099 - G
- Commissions Received/Paid
- Sales of Stocks or Bonds - Form 1099 - B
- Self-Employed Business/Farm Income & Expenses - Form 1099 MISC
- Lottery or Gambling Winnings - Form W-2G
- Lottery or Gambling Losses
- Income and Expenses From Rentals
- Income from Partnerships, S. Corporations, Trust, and Estate - Schedule K-1
- IRA Contributions
- Alimony Paid or Received
- Child Care Expenses & Provider information
- Medical, Eye Care, and Dental Expenses
- Cash & Noncash charitable Donations
- Record of Purchase or Sale of Residence
- Mortgage or Home Equity Loan Interest Paid - Form 1098
- Real Estate and Personal Property Taxes Paid
- State or Local Sales Taxes Paid
- Unreimbursed Employment - Related Expenses
- Job related educational expenses
- Educator expenses
- Tuition and Education Fees - Form 1098-T
- Student Loan Interest - Form 1098 -E
- Casualty or Theft losses
- Estimated Taxes
- Foreign Taxes Paid

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