WHAT TO BRING FOR MY TAX APPOINTMENT

Filing Status and Members of Household

* Married, divorced or separated in 2017
  1. Married – prior year’s returns of both spouses
  2. Divorced – finalized date; copy of the divorce decree
  3. Separated – date lived apart
* Birth or adoption
  1. Social Security Cards and adoption papers
* Adoption Expenses
  1. Date and amount of expenses, date of adoption, special needs certification
* Death of child or spouse
  1. Date of death
* Additional members of household
  1. Date of occupancy and relationship
  2. Copy of their social security card

Income

* W2s from all Employers during 2017
* Unemployment Income - Form 1099-G
* Retirement Account Distributions – Form 1099-R
* Social Security Income - Form 1099-SSA
* Sale of Stocks, bonds – Form 1099-B
* Interest Income – Form 1099-INT
* Dividend Income – Form 1099-DIV
* Lawsuit Settlements – 1099-MISC (Reason for settlement and any documents received)
* Prizes – 1099-MISC
* Other Income – 1099-MISC
* Gambling Winnings – W2-G

Adjustments to Income

* Student Loan Interest – Form 1098-T
* Health Savings Account Distribution – Form 1099-SA
* Health Savings Account Contribution – Form 5498-SA
* Traditional or ROTH IRA Contributions
* SEP or SIMPLE Plan Contributions

Health Insurance

* Any Form 1095-A, 1095-B, or 1095-C
* Other verification of health insurance during the year (pay stub)

CHECKING ACCOUNT INFO FOR DEPOSIT

* Bank Name
* Routing Number
* Account Number

Higher Educational Expenses

* Tuition and Fees Statement - Form 1098 for taxpayer or dependent
* Documentation (Fee Bill) of additional expenses paid

Child Care Expenses

* Name, address and SSN/EIN of the day-care provider
* Amount paid to the provider

Itemized Deductions

* Health Insurance Premiums paid post tax
* Totals of other medical, dental, prescription & vision expenses paid
* Medical Miles driven
* Real Estate Property taxes paid on primary and secondary residences
* Mortgage Interest – Form 1098 (primary and secondary residences)
* Refinance Mortgage? – Bring settlement papers
* Sales tax paid on vehicle, motorcycle or home purchase
* Charitable contributions
  1. Date, amount and type of contribution
  2. Acknowledgement of gift from the organization if more than $250
  3. Transfer of IRA to charity (brokerage statement showing transfer)

Job Related Expenses

* Meals, lodging, and misc expense amounts for items related to employment
* Total miles driven per vehicle and Total Business miles driven per vehicle

Rental Property

* Please review the worksheet for Rental Income and Expenses

Self Employed Business

* Please review the worksheet for Business Income and Expenses