



Appointment Date: _____ Appointment Time: _____

Here's what you'll need to bring with you to your tax appointment:

Proof of identification (Drivers License, Government issued Photo I.D.).

Social Security Cards for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration. If you or your dependent is not eligible to get a Social Security Number, you may need to obtain an Individual Taxpayer Identification Number (ITIN). We can help you do this.

Birth dates for you, your spouse and any dependents on the tax return.

Wage and earning statement(s) Form W-2, W-2G, and 1099-R, from all employers and payers. If you have not received your Forms W-2 from your employer and want to know what to do, we can help. Call us.

Self-employed business income and expenses - Forms 1099-MISC and 1099K.

Records of job-related educational expenses and un-reimbursed employment related expenses.

Interest and dividend statements - Forms 1099-INT and 1099-DIV.

Social Security, State Income Tax refund and Unemployment Compensation statements - Forms SSA-1099 and 1099-G.

Information on Broker and Barter Exchange Transactions - Form 1099-B.

Records of lottery or gambling winnings and losses.

Records of rental income and expenses, IRA contributions, and alimony paid or received.

Mortgage Interest Statement - Form 1098 (including home equity loans); and records of the purchase or sale of your residence.

Records of real estate and personal property taxes paid.





Records of state or local taxes paid (including sales tax*).

Records of canceled debt amounts - Form 1099-C.

Records of medical, eye care and dental expenses.

Receipts for cash and non-cash charitable contributions.

Tuition and Education Fees paid - Form 1098-T; and Student Loan Interest paid - Form 1098-E.*

Records of educator expenses paid.*

Records of moving expenses paid and any casualty or theft losses.

Total amount paid for a day care provider and the day care provider's tax identifying number - the provider's Social Security Number or Employer Identification Number.

Records of any qualified energy efficient home improvements paid.*

Health Insurance Marketplace Statement - Form 1095-A.**

Health Coverage Statements from your Insurer or Employer - Form 1095-B/1095-C.

Records of federal and state estimated taxes and foreign taxes paid.

A copy of last year's federal and state tax returns, if available.

To file taxes electronically on a married filing joint tax return, both spouses must be present to sign the required forms.

* This provision has expired, but may be extended by Congress, so bring it.

** If you purchased health insurance through a Federal or a State Marketplace.

