What to bring to your tax appointment

Miscellaneous

\_\_If you were in a federal disaster area

\_\_Any correspondence received from state or IRS

\_\_Estimated tax payments to state or IRS

\_\_Educator expenses

\_\_Payments to (distributions from) an HSA (health savings account)

\_\_Amount of economic stimulus check (or debit card) received

Self Employment

\_\_1099-MISC, 1099-NEC, Schedule K-1, and records of income not reported

\_\_Records of all expenses

\_\_Business use assets (cost, dates placed in service)

\_\_Office in home

Vehicle Information

\_\_Total miles driven for the year

\_\_Total business miles driven (not commuting)

\_\_Parking and tolls

Itemized Deductions

\_\_Mortgage statement form 1098

\_\_Amount of state or local income tax paid

\_\_Real estate tax paid

\_\_HUD form if house purchased this year

\_\_Cash/check payments to charities

\_\_Records of non-cash charitable donations

\_\_Amounts paid for health/long term care insurance and out of pocket medical expenses

\_\_Miles driven for charitable or medical purposes

Education

\_\_Bills from college and statements of charges and payments

\_\_Tuition payments Forms 1098-T

\_\_Student loan interest paid Forms 1098-E

\_\_Contributions to college savings plans

Retirement Plans

\_\_Amount contributed to IRA

\_\_Basis in IRA

\_\_Year-end value of IRAs

\_\_Self-employed KEOGH, SEP or SIMPLE contributions

\_\_Pension, IRA, veterans or annuity income (1099-R)

\_\_Social Security/RRB income (1099-SSA, RRB-1099)

Rental Home

\_\_Records of income and expense

\_\_Rental asset information (cost, date placed in service)

\_\_Number of days personal use vs available for rent

Employee Income

\_\_Forms W-2

\_\_Tips not shown on W-2

Personal Information (for you and spouse)

\_\_Your social security number

\_\_Your driver’s license

\_\_Amount of alimony paid and SSN of former spouse

\_\_Previous three year’s tax returns

Other people

\_\_Dates of birth and social security numbers

\_\_Childcare records (including address and ID number)

\_\_Approximate income of others living in your house

\_\_Form 8332 showing who claims the children

Other Income

\_\_Unemployment, state tax refund (1099-G)

\_\_Gambling income (W-2G or records showing income and expense)

\_\_Alimony received and former spouse’s name

\_\_Health care reimbursement (1099-SA or 1099-LTC)

\_\_Jury duty payments

\_\_Hobby income and expenses

\_\_Prizes and awards

\_\_Any other 1099 forms

\_\_Debt forgiveness Form 1099-C

\_\_Disability income

Savings and Investments

\_\_Interest and dividend income (1099-INT, 1099-OID, 1099-DIV)

\_\_Income from sales of stocks or other property (1099-B, 1099-S)

\_\_Dates and records of purchase or cost of property you sold