

WHAT TO BRING

PERSONAL INFORMATION FOR EACH FAMILY MEMBER:

- Name
- Date of Birth
- Social Security Card/ITIN/ATIN
- Last Year's Tax Return
- Valid Driver's License

INCOME AND TAX INFORMATION:

- W-2's
- Interest (1099-INT or substitute)
- Dividend Slips (1099-DIV or substitute)
- Stock Sales (1099-B or Broker Statement)
- Self-Employment Income and Expenses
- Sale of a Personal Residence
- Rental Income and Expenses
- Sale of any Business Assets
- Gambling or Lottery Winnings (W-2G for some winnings)
- State Income Tax Refund (1099-G)
- Pension Income (1099-R)
- Estimated Taxes Paid
- Social Security or Railroad Retirement (SSA-1099 or RRB-1099)
- IRA or 401(k) Distribution (1099-R)
- Non-employee compensation (1099-NEC)
- Unemployment Compensation (1099-G)
- Miscellaneous Income (1099-MISC)

DEDUCTIONS/ADJUSTMENTS:

- Medical Expenses
- Real Estate or Personal Property Taxes

- Mortgage Interest
- Charitable Contributions (cash and non-cash)
- Employee Business Expenses
- Gambling Losses
- Moving Expenses
- Traditional IRA Contributions
- Higher Education Expenses
- Educator Expenses
- Student Loan Interest

TAX CREDITS:

- Child Care Provider/Address and Employer Identification Number (EIN) or Social Security Number (SSN)
- Adoption Expenses
- Retirement Savings Contributions Credit

WHAT'S NEXT

Whether you may owe taxes or are expecting a refund, we will inform you of your next steps. Safeguard a copy of your tax return (we will provide this to you), along with your other important paperwork, in case you need to file an amendment or reference it in the future. Other paperwork, such as documentation regarding the sale of your home or stock transactions, should also be kept.

We are here for you – before, during, and after you have completed your taxes with us. We stand behind and guide you through an audit case on the tax return we prepared, we will assist in amendments to your return, and answer questions regarding your taxes.