



What to Bring Checklist

PERSONAL INFORMATION:

- ☐ Valid picture I.D.
- ☐ Social Security cards or Individual Taxpayer Identification Number (ITIN) cards or letters for all persons listed on the tax return (including all dependents)
- ☐ Birth Date for all persons listed on the tax return
- ☐ 3 year's prior tax return including all documents (NEW CLIENTS ONLY)
- ☐ For Direct Deposit of your refund, bring a check OR your savings account number and routing number of your bank

INCOME STATEMENTS OR FORMS:

- ☐ Wages from each job (Form W-2)
- ☐ Independent Contractor earnings (Form 1099-MISC)
- ☐ Interest (Form 1099-INT)
- ☐ Dividends (Form 1099-DIV)
- ☐ Retirement Plans (Form 1099-R)
- ☐ Gambling Winnings (Form W-2G)
- ☐ Unemployment (Form 1099-G)
- ☐ Social Security Benefits (Form SSA-1099)
- ☐ Year end income statements for MFIP, SSI, MSA, GA, veteran's benefits, and worker's compensation
- ☐ Tuition expenses you paid to attend a university, college or technical school (Form 1098-T)
- ☐ Interest you paid on student loans (Form 1098-E)
- ☐ Day care expenses you paid for your children. Bring provider's name, address, phone number and tax ID or Social Security Number

ITEMIZED DEDUCTIONS:

- ☐ Medical and Dental Expenses
- ☐ Medical Miles Driven
- ☐ Medical Premiums Paid - Long Term Premiums
- ☐ **Homeowners:** Mortgage interest and real estate (Form 1098) and Statement of Property Tax Interest (Form 1099-INT)
- ☐ Points Paid - New home owners bring Settlement Statement
- ☐ Personal Property Taxes - i.e. DMV fees
- ☐ General Sales Tax - such as large taxes paid on new vehicle
- ☐ Charitable donations of cash or non-cash items or receipts or list of items
- ☐ Charitable Mileage
- ☐ Receipts for education expenses you paid for your children in grades K-12. For example: tutoring, rental/purchase of instrument, music lessons, pens, pencils, and notebooks. (EDUCATORS ONLY)
- ☐ Casualty or Theft Losses
- ☐ Job Expenses
- ☐ Tax Prep Fees
- ☐ Safety Deposit box - Investment Fees
- ☐ Other Miscellaneous Deductions

LOYAL CLIENTS need not bring personal identifying information, such as social security numbers, birth dates or direct deposit information, unless it has changed. All information proforma's into the current tax year.

NEW CLIENTS, please don't forget to bring the last 3 years tax forms with all documents. There maybe carry back or carry forward information important for your current year filing or may errors or omissions. We will double check for you, for your peace of mind.

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