



Tax Preparation • Accounting Services • Year Round Assistance

### What do I need to bring?

- A copy of your most recent return – for **NEW CLIENTS ONLY**
- Names, birthdates and social security numbers for any new dependents
- All income reporting statements, including wages, retirements, unemployment compensation, etc – W-2s, 1099s, etc.
- All interest and dividend income statements from banks, credit unions - Forms 1099int, 1099div if over \$10
- Stock transactions including sales prices and original purchase prices - Form 1099B
- Any IRA or SEP contributions or distributions
- Interest paid on student loans – Form 1099
- HSA or MSA contributions or distributions – Form 1099
- Amounts paid during the year for medical expenses, including premiums that are not pretaxed, doctors, hospitals, dental, optical, prescriptions, etc.
- Mortgage interest and real estate taxes paid – Form 1098
- Cash and non cash contribution amounts
- College tuition and books paid for with funds other than scholarships and grants – Form 1098T
- Any work related expenses in which you are NOT reimbursed for, ie uniforms, travel, education, mileage (except to and from work), professional fees, dues, etc.
- Amounts paid for childcare, along with providers name and social security or employer ID number
- Health insurance coverage information – form 1095 A, B or C
- Business information for self employed individuals only. See Schedule C and E worksheets
- Any payments made to the IRS or State Tax Commissions during the year
- Any correspondence received from the IRS or State Tax Commission received during the year
- List of any questions that you may have for your tax preparer