

# WHAT TO BRING FOR MY TAX APPOINTMENT

## Filing Status and Members of Household

- Married, divorced or separated in 2017
  - a. Married – prior year’s returns of both spouses
  - b. Divorced – finalized date; copy of the divorce decree
  - c. Separated – date lived apart
- Birth or adoption
  - a. Social Security Cards and adoption papers
- Adoption Expenses
  - a. Date and amount of expenses, date of adoption, special needs certification
- Death of child or spouse
  - a. Date of death
- Additional members of household
  - a. Date of occupancy and relationship
  - b. Copy of their social security card

## Income

- W2s from all Employers during 2017
- Unemployment Income - Form 1099-G
- Retirement Account Distributions – Form 1099-R
- Social Security Income - Form 1099-SSA
- Sale of Stocks, bonds – Form 1099-B
- Interest Income – Form 1099-INT
- Dividend Income – Form 1099-DIV
- Lawsuit Settlements – 1099-MISC (Reason for settlement and any documents received)
- Prizes – 1099-MISC
- Other Income – 1099-MISC
- Gambling Winnings – W2-G

## Adjustments to Income

- Student Loan Interest – Form 1098-T
- Health Savings Account Distribution – Form 1099-SA
- Health Savings Account Contribution – Form 5498-SA
- Traditional or ROTH IRA Contributions
- SEP or SIMPLE Plan Contributions

## Health Insurance

- Any Form 1095-A, 1095-B, or 1095-C
- Other verification of health insurance during the year (pay stub)

## CHECKING ACCOUNT INFO FOR DEPOSIT

- Bank Name
- Routing Number
- Account Number

### Higher Educational Expenses

- Tuition and Fees Statement - Form 1098-T for taxpayer or dependent
- Documentation (Fee Bill) of additional expenses paid

### Child Care Expenses

- Name, address and SSN/EIN of the day-care provider
- Amount paid to the provider

### Itemized Deductions

- Health Insurance Premiums paid post tax
- Totals of other medical, dental, prescription & vision expenses paid
- Medical Miles driven
- Real Estate Property taxes paid on primary and secondary residences
- Mortgage Interest – Form 1098 (primary and secondary residences)
- Refinance Mortgage? – Bring settlement papers
- Sales tax paid on vehicle, motorcycle or home purchase
- Charitable contributions
  - a. Date, amount and type of contribution
  - b. Acknowledgement of gift from the organization if more than \$250(Mandatory)
  - c. Transfer of IRA to charity (brokerage statement showing transfer)

### Job Related Expenses

- Meals, lodging, and misc expense amounts for items related to employment
- Total miles driven per vehicle and Total Business miles driven per vehicle

### Rental Property

- Worksheet of Income and Expenses
- New Property? – Bring closing documents

### Self Employed Business

- Worksheet of Income and Expenses