

WHAT TO BRING FOR MY TAX APPOINTMENT

Filing Status and Members of Household

- Married, divorced or separated in 2020
 - 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

Income

- W2s from all Employers during 2020
- 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
- K1s

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
 - Please note, if you received subsidy for health insurance at any point in the year, you will have a 1095-A attached to your ID#. Your return will NOT be processed by the IRS without this form. Please check if you have an account with healthcare.gov

CHECKING ACCOUNT INFO FOR DEPOSIT AND/OR WITHDRAWAL

- Bank Name
- Routing Number
- Account Number
- Cancelled check, optional

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
- 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

- Job Related expenses for employees are no longer deductible under the Tax Cuts and Jobs Act.

Rental Property

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

Self Employed Business

- Worksheet of Income and Expenses
- A breakdown of expenses by category(Be Specific)

Updated Personal Information

- Email address
- Home Address or mailing address for tax documents
- Telephone numbers

**** New clients, please have a copy of your previously filed tax returns.

