

## What to Bring to Your Tax Appointment

### Personal Information:

- Social security numbers and dates of birth for you, your spouse, your dependents
- Bank account number and routing number, if depositing your refund directly into your account
- Copies of last year's tax return for you and your spouse. NEW CLIENTS ONLY
- Driver's License

### Income:

- W-2: Your earnings from your employer
- W-2G: Gambling winnings
- Forms received for sports betting
- 1099-K for any payments you received through a credit or debit card or other electronic payment system.
- Transactions involving cryptocurrency
- 1099-DIV, -INT, -B or K-1s for investment or interest income
- 1099-MISC, 1099-NEC: Income not derived from investments (e.g., contract work)
- 1099-R and SSA-1099 for retirement plan distributions and Social Security benefits
- 1099-SA for distributions from a health savings account
- 1099-S forms for income from sale of property
- 1099-G forms for unemployment income
- 1099-C forms for cancellation of debt
- 1095-A if you purchased health insurance through the Health Insurance Marketplace. If you received a 1095-B or C, you do not need to bring it in.
- Business income and expenses
- Rental property income and expenses: profit/loss statement, suspended loss information
- Miscellaneous income: jury duty, Medical Savings Account, scholarships, etc.

### Expenses:

- Form 1098: Mortgage Statement
- Property tax bill (unless you pay from an escrow account and the amount paid is on your 1098)
- Out of pocket medical expenses
- Charitable contributions/donations

### Other Income, Possible Adjustments, Deductions, and Credits

- Records of any contributions made during to an IRA or medical savings account
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- Self-employed health insurance payment records
- Keough, SEP, SIMPLE, and other self-employed pension plans
- Childcare costs: provider's name, address, tax ID and amount paid
- 1098-E for student loan interest paid, 1098-T for tuition paid

### Other information

- Estimated tax payments made during the year. Know the dates of the payments
- Prior-year refunds applied to the current year
- Any amounts paid with extension
- Foreign bank account information: location, name of bank, account number, peak value of account