

# What Do I Need to Bring to My Tax Appointment?

Please also bring a copy of everyone's SS card and Driver's Licenses

## Personal Information

- ☐ Your social security number
- ☐ Your spouse's full name and social security number
- ☐ Amount of any alimony paid and ex-spouse's social security number
- ☐ Add Your **2014** tax return(s). Your Tax Professional can check them for accuracy

## Other people who may belong on your return

- ☐ Dates of birth and social security numbers
- ☐ Childcare records (including the provider's ID number) if applicable
- ☐ Approximate income of other adults in your home (not spouse, if you're filing jointly)
- ☐ Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you

## Other Income

- ☐ Unemployment, state tax refund (1099-G)
- ☐ Gambling income (W-2G or records showing income, as well as expense records)
- ☐ Amount of any alimony received and ex-spouse's name
- ☐ Health care reimbursements (1099-SA or 1099-LTC)
- ☐ Jury duty records
- ☐ Hobby income and expenses
- ☐ Prizes and awards
- ☐ Other 1099

## Vehicle Information

- ☐ Total miles driven for the year (or beginning/ending odometer readings)
- ☐ Total business miles driven for the year (other than commuting)
- ☐ Amount of parking and tolls paid
- ☐ If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

## Savings and Investments

- ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sales of stock or other property (1099-B, 1099-S)
- ☐ Dates of acquisition and records of your cost or other basis in property you sold

## If you were affected by a federally declared disaster

- ☐ City/county you lived/worked/had property in
- ☐ Records to support property losses (appraisal, clean up costs, etc.)
- ☐ Records of rebuilding/repair costs
- ☐ Insurance reimbursements/claims to be paid
- ☐ FEMA assistance information
- ☐ Check FEMA site to see if my county qualifies for individual assistance

## Retirement Income

- ☐ Pension/IRA/annuity income (1099-R)
- ☐ Social security/RRB income (1099-SSA, RRB-1099)

## Employee Information

- ☐ Forms W-2

## IRA Information

- ☐ Amount contributed
- ☐ Traditional IRA basis
- ☐ Value of IRAs on Dec. 31, 201:

## Rental Income

- ☐ Records of income and expenses
- ☐ Rental asset information (cost, date placed in service, etc.) for depreciation

## Education Payments

- ☐ Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid
- ☐ Forms 1098-T and 1098-E, if you received them
- ☐ Scholarships and fellowships

## Self-Employment Information

- ☐ Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s.
- ☐ Records of all expenses — check registers or credit card statements, and receipts
- ☐ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ☐ Office in home information, if applicable

## Itemizing Deductions

- ☐ Forms 1098 or other mortgage statements
- ☐ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- ☐ Real estate and personal property tax records
- ☐ Invoice showing amount of vehicle sales tax paid
- ☐ HUD statement showing closing date of home purchase
- ☐ Cash amounts donated to houses of worship, schools, other charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- ☐ Amounts of miles driven for charitable or medical purposes
- ☐ Expenses related to your investments
- ☐ Amount paid for preparation of your 2010 tax return
- ☐ Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- ☐ Job-hunting expenses