

What Should You Bring to Have Your Tax Return Prepared

Following is a list of the more common items you should bring if you have them.

- Wage statements (Form W-2)
- Pension, or retirement income (Forms 1099-R)
- Dependents' Social Security numbers and dates of birth
- Last year's tax return. If we did your taxes last year we have it but it is a good practice to bring it anyway
- Information on education expenses
- Information on the sales of stocks and/or bonds
- Self-employed business income and expenses
- Lottery and/or gambling winnings and losses
- State refund amount
- Social Security and/or unemployment income
- Income and expenses from rentals
- K-1's from any Partnerships , S-Corps or Trusts
- Record of purchase or sale of real estate
- Medical and dental expenses
- Real estate and personal property taxes
- Estimated taxes or foreign taxes paid
- Receipts for cash and non-cash charitable donations
- Mortgage or home equity loan interest paid (Form 1098)
- Unreimbursed employment-related expenses
- Job-related educational expenses
- Child care expenses and provider information. You will need the address and either their EIN or SSN.
- And any other items that you think may be necessary for your taxes. Generally a good rule of thumb is if you are not sure if you need a document bring it.



If you purchased a home and may be eligible for the Homebuyers Credit the IRS generally requires you bring a copy of the settlement statement. Normally this will be a properly executed Form HUD-1.