

What to bring to your tax appointment

This is a reference guide / organizer planner, and is **not** intended to be all inclusive to your tax situation.

New Clients (or existing clients w/ newly issued IDs):

- Government issued Photo ID for all adults on your return (i.e. drivers license or state ID)
- Social security cards for each person on the return (includes dependents)
- For claimed Dependents
 - Proof of relations (i.e. birth certificate, adoption record)
 - Proof of residence (i.e. school record for dependents 17 or younger)
 - Dependents 18 or older may need additional evidence (i.e. disability or in school); contact us with questions.
- Copy of the last tax return filed.

Items related to Credits (if applicable):

- Child and Dependent Care:**
 - Name, social/EIN, address, phone number of care provider, and Amount paid.
 - Dependent must live with you 51% of the time and you provide 50% of support.
- Education:**
 - Tuition Statement from accredited school (1098-T)
 - Cost of books, supplies, & computer (if purchased for school)
 - For distributions from a 529 educational savings account or cash education bonds; bring 1099-Q or 1099-int.
- Proof of health insurance**
 - 1095-A issued by Marketplace for healthcare premium credit received
 - 1095-B issued by your insurance company showing who and when coverage period
 - 1095-C issued by your employer showing if coverage was offer to you

All Clients:

Income:

- Wages-W2s (we cannot use paystubs)
- Interest earned (1099-interest)
- Dividends earned (1099-dividend)
- State refund from prior year if you itemized (1099-G)
- Alimony paid to you
- Business income & expenses for Sole Proprietor or Single-member LLCs
- Sales-stock (1099-B), collectibles, properties (1099-S), business property
- Retirement distributions (1099-R)
- Rental income and expenses
- Royalties (1099-Misc)
- K-1 reporting for partnerships, S-corps, trusts
- Farm income and expenses
- Unemployment (1099-G)
- Social Security statement (1099-SSA)
- Other income (Cancellation of debt, gambling winnings, prizes, scholarships, Alaska Permanent Fund, Not for profit net rent, jury duty)

Adjustments to income:

- Educator expense (un-reimbursed cost of teacher/student materials)
- Retirement contributions (IRA, SEP, other self-administered accts)
- Health insurance premium statements (1095 A/B/C all copies)
- Student loan interest paid (1098-E)
- Health Savings Account (1099-SA for distributions, 5498-SA contributions)

Deductions:

- Medical expenses paid (i.e. doctors, hospitals, RX, dental, vision); must exceed 10% of AGI (7.5% if over 65)
- Taxes paid (i.e. Real estate, boats, trailers, RVs, irrigation if paid but not received)
- Mortgage interest / closing documents
- Mortgage insurance (PMI, MIP)
- Charitable Donations (cash and non-cash goods listed separately; must have receipt/record from charitable organization)
- Un-reimbursed Job expenses