



## What should I bring to my appointment?

Driver's License / State ID (not expired)	Taxpayer Social Security Card	All dependent Social Security Card
<b>Proof of Insurance (Health card for Taxpayer dependent)</b>	<b>Proof of Income (W2, 1099, etc.)</b>	<b>Schedule C Business/1099/Gross Receipts/Expenses</b>
<b>Education Credits – 1098T</b>	<b>Dependent Care Expenses</b>	<b>Direct Deposit Information (voided check)</b>

### Income Sources

- W-2
- Self-employed business income and expenses / 1099-MISC /1099-NEC
- Commission you received or paid
- Pension or retirement income / 1099-R
- Unemployment income / 1099-G
- Social Security Income / SSA-1099
- Alimony paid or received
- Lottery or gambling winnings/loses (If you itemize, even if you have winnings, losses may be listed on Schedule A in your favor)

### **State and Local Taxes**

- State or local paid
- State refund amount / 1099-G
- Estimated taxes or foreign taxes paid

### **Family**

- Medical and Dental Expenses
- Childcare expenses and provider information
- Mileage records to doctor appointments

### **Savings & Investments**

- IRA Contributions
- Interest and dividend income/ 1099-INT or 1099-DIV
- Statements on stock or bond sales/ 1099-B

### **Work Expenses (Unreimbursed)**

- Uniforms, union dues/expenses, dues to professional societies, licenses and regulatory fees, subscriptions to professional journals/trade magazines, tools/supplies used in your work, occupational taxes, passport for a business trip, travel, transportation, meals, entertainment, gifts and local lodging related to your work.
- Job-related educational expenses

### **Education Expenses (Unreimbursed)**

- Classroom expenses for teachers
- Tuition, books, supplies/equipment needed for a course of study, notebooks, eBooks, education fees, non-academic fees, student activity fees, athletic fees.
- Student loan interest / 1098-E

### **Other**

- Charitable donations, cash and non-cash
- Casualty or theft losses
- Mileage records for travel to and from Goodwill, Salvation Army, charity events, volunteer work, etc.