

## What to Bring to Your Appointment

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- Last year's tax return (*new clients only*)
- Tax Payer(s) Social Security card(s)
- Driver's License / Identification Card(s)
- Dependants' Social Security / ITIN numbers and dates of birth\*
- IRS Letter 6419 Advance Child Tax Credit
- IRS Letter 6475 3<sup>rd</sup> Stimulus Payment
- Wage statements / W-2s
- Self-employment business income and Expenses / 1099-NEC\*/ 1099K\*
- Partnerships and Corporations / K1\*
- Pension, retirement income/1099-R\*
- Unemployment income / 1099-G\*
- Cancellation of Debt Amount/1099-C\*
- Acquisition or Abandonment of Secured Property / 1099A
- Social Security income/SSA-1099\*
- Rail Road Retirement / RRB-1099-R\*
- 1095A Health Insurance Marketplace Stmtnt
- IRA contributions\*
- Statements on the sales of stocks or bonds/1099-B \*
- Interest and dividend income / 1099-INT and 1099-DIV\*
- Lottery or gambling winnings / W-2G and losses\*
- Income and expenses from rental property\*
- Alimony paid or received\*
- Record of sale of residence / 1099S\*
- Medical and dental expenses\*
- Real estate and personal property taxes\*
- Sales tax paid\*\*
- Estimated taxes paid / Copies of canceled checks
- Cash and non-cash charitable donations copies of canceled checks and receipts\*
- Mortgage or home equity loan interest paid/1098\*
- Job-related educational expenses\*
- Educator expenses\*\*
- Tuition and Education Fees / 1098-T\*
- Student loan interest / 1098-E\*
- Receipt(s) for qualified energy efficient home improvements\*
- Casualty or theft losses / copy of police report and insurance reimbursement\*
- Daycare expenses and provider information Name, Address and Tax ID Number\*
- For Direct Deposit- Bank name, Routing number and Account number
- Any and all mail that says "Important Tax Information"

\*If Applicable