

WHAT TO BRING?

APPLY FOR ITIN TAX ID

- Federal Income Tax Return
- Original proof of identity
 - Passport, or 2 of the following;
 - National Identification Document
 - U.S. Driver's License
 - Birth Certificate
 - Voter registration from your country
 - Visa
 - Medical (for dependents only)
 - School Records (for dependents only)

TAX PREPARATION CHECKLIST

- Personal Information
 - Social Security numbers of self, spouse, and dependents
 - Date of birth of self, spouse, and dependents
 - Bank account number and routing number, if depositing refund directly to account
 - If you claim children as dependents: school or medical records of each child
 - If you have health insurance: proof of insurance, medical card
- Information of Income
 - W-2 forms for you and your spouse
 - 1099-C forms for cancellation of debt
 - 1099-G forms for unemployment income, or state or local tax refunds
 - 1099-MISC forms for you and your spouse
 - 1099-R, Form 8606 for payments/distributions from IRAs or retirement plans
 - 1099-S forms for income from sale of a property
 - 1099-INT, -DIV, -B, or -K-1s for investment or interest income
 - SSA-1099 for Social Security benefits received
 - Alimony received
 - Business or farming income- profit/loss statement, capital equipment information
 - Rental property income and expenses: profit/loss statement, suspended loss information
 - Miscellaneous income: Jury duty, gambling winnings, Medical Savings Account, scholarships, etc.
- Adjustments to your income
 - Form 1098- E for Student loan interest paid
 - Form 1098-T for tuition paid
 - For Teachers: canceled checks or receipts for expenses paid for classroom supplies, etc.
 - Self-employed health insurance payment records

- Alimony paid
- Self-employed pension plans
- Deductions and Credits
 - Child care costs: provider's name, address, tax ID, and amount paid
 - Education cost: Form 1098-T, education expenses
 - Adoption cost: SSN of child; records of legal, medical and transportation cost
 - Forms 1098: Mortgage interest, private mortgage insurance, and points paid
 - Records of home business expenses, home size/office size, home expenses
 - Medical and dental expense records
 - Casualty and theft losses: amount of damage, insurance reimbursements