

ITEMS TO BRING TO YOUR TAX APPOINTMENT

Dependents' Social Security Numbers & Dates of Birth

Wage Statements –Form W-2

Pension or Retirement Income -1099-R

Interest and Dividend Income – Form 1099-INT/Form 1099-DIV

State Income Tax Refund Amount –Form 1099-G

Social Security Income – Form SSA-1099

Unemployment Income – Form 1099-G

Lottery or Gambling Winnings – From W-2G

Sales of Stocks or Bonds – Form 1099-B

Cancellation of Debt –Form 1099-C

Child Care Expenses & Provider Information

Let your preparer know if you have dependent care benefits through your employer

Student Loan Interest –Form 1098-E

Tuition and Education Fees –Form 1098-T

Estimated Taxes Paid (We need the date it was paid)

If you had Health Insurance through the Marketplace we need the 1095-B

Advance child tax credit payments received in 2021

If you purchased merchandise from out of state you are required to pay a

ITEMIZED DEDUCTIONS

Medical:

Doctor/Dental \$ _____

Prescriptions \$ _____

Long Term Care \$ _____

Other Medical \$ _____

Medical Miles _____

Mortgage/Taxes:

Real Estate Taxes \$ _____

Other Taxes \$ _____

Home Mortgage \$ _____

Home Equity \$ _____

Contributions:

Church \$ _____

Non Cash donations \$ _____

Other Charity \$ _____

Charity Mileage _____