WHAT TO BRING TO YOUR TAX INTERVIEW

NEW CLIENTS ONLY		❑ Child Care Expenses/Documentation
❑ Last Two Years Tax Returns		❑ DMV Fees Paid on Vehicles
ALL CLIENTS (NEW & RETURNING)		❑ Interest Paid (Mortgage, Car, Etc.)
❑ Your/Spouse/Dependent's SSNs		❑ Taxes Paid (Real Estate, Sales, etc.)
❑ U.S. Tax ID Number for non-citizens who must file		❑ Medical & Dental Expenses
❑ Birthdate Info. (You, Spouse, Dependents)		❑ Work-Related Expenses/Mileage Log
❑ Driver's License (You, Spouse, Dependents)		❑ Estimated State & Federal Payments
❑ All W-2, 1099s & 1098s, Schedule K-1		❑ Purchase or Sale of Residence Records
❑ Interest & Dividend Income		❑ Charitable Donations
❑ Pension & Retirement Income		❑ Gambling income
❑ Gambling Winning & Losses		❑ Healthcare information
❑ Social Security/Unemployment Ins./RRB income		❑ Education Expenses
❑ Alimony Paid or Received		**FOR BUSINESS/RENTAL CLIENTS**
❑ State/Local Refunds or Amount Due		❑ Self-Employment Income & Expenses
❑ Stock Purchase & Sale Cost/Dates		❑ Income & Expense From Rentals
❑ Year-End IRA, 401K Statements		❑ Office-In-Home Information
❑ Education Expenses/Student Loan Interest		❑ Mileage Log/Vehicle Information
❑ Legal Documents: divorce, adoption, custody		**MISCELLANEOUS**
❑ Moving Expenses		❑ Anything with message that says "Tax Documents"
❑ Health Savings Account & long-term care		❑ Any information you think might be important
❑ Retirement, IRA & HSA Savings		❑ Not sure? Bring it!

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