

PLEASE BRING A COPY OF THE LAST INCOME TAX RETURN FILES IF POSSIBLE

PERSONAL INFORMATION

Your social security number or tax ID number

] Your spouse's full name and social security number or tax ID number

] Up to date contact information

State issue driver's license for the taxpayer and spouse

DEPENDENT(S) INFORMATION

Dates of birth and social security numbers or tax ID numbers

] Income of other adults in your home

Form 8332 showing that the child's custodial parent is releasing their right to claim a child to

you, the noncustodial parent (if applicable)

SOURCES OF INCOME

Employed

] Forms W-2

Unemployed

Unemployment, state tax refund (1099-G)

Self-Employed

Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s

Records of all expenses — check registers or credit card statements, and receipts

Business-use asset information (cost, date placed in service, etc.) for depreciation

Office in home information, if applicable

Record of estimated tax payments made (Form 1040ES)

Rental Income

	Records of income and expenses
	Rental asset information (cost, date placed in service, etc.) for depreciation
	Record of estimated tax payments made (Form 1040ES)
Retir	ement Income
	Pension/IRA/annuity income (1099-R)
	Social security/RRB income (1099-SSA, RRB-1099)
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Savings & Investments or Dividends

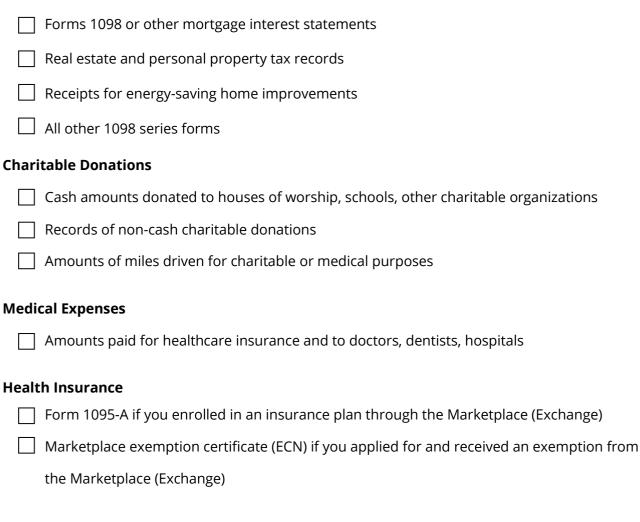
- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-S)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
 - Expenses related to your investments
- Record of estimated tax payments made (Form 1040ES)

Other Income & Losses

- Gambling income (W-2G or records showing income, as well as expense records)
 - Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trusts
- Royalty Income 1099 Misc.
- Any other 1099s received
- Record of alimony paid/received with Ex-spouse's name and SSN

TYPES OF DEDUCTIONS

Home Ownership



Childcare Expenses

Fees paid to a licensed day care center, as well as the EIN and address of the daycare

Wages paid to a baby-sitter, be sure to have their name and SSN

Don't include expenses paid through a flexible spending account at work.

Educational Expenses



Forms 1098-T from educational institutions

Receipts that itemize qualified educational expenses

Form1098-E if you paid student loan interest

State & Local Taxes or Sales Tax
Amount of state/local income tax paid (other than wage withholding), or amount of state and
local sales tax paid
Invoice showing amount of vehicle sales tax paid
Retirement & Other Savings
Form 5498-SA showing HSA contributions
Form 5498 showing IRA contributions
All other 5498 series forms (5498-QA, 5498-ESA)
Federally Declared Disaster
City/county you lived/worked/had property in
Records to support property losses (appraisal, cleanup costs, etc.)
Records of rebuilding/repair costs
Insurance reimbursements/claims to be paid
FEMA assistance information
Check FEMA site to see if my county has been declared a federal disaster area
Job Expenses & Tax Prep Fees (2017 & Prior)
Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax,
interest expense, parking)
Receipts for classroom expenses (for educators in grades K-12)
Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
Job-hunting expenses
Record of moving expenses not reimbursed by employer
Amount paid for preparation of last year's tax return