

Checklist of what to gather before your appointment!

- _____ A copy of last year's tax return
- _____ Personal identification (driver's license, Social Security card) for you and your spouse, if applicable, showing the SSN(s)
- _____ The Social Security cards of your dependents, if applicable
- _____ Forms W-2 from all of your employers
- _____ Forms 1099-INT showing interest paid to you throughout the year.
- _____ Form 1099-G showing any refund, credit or offset of state and local taxes.
- _____ All receipts pertaining to your small business
- _____ Forms 1099-DIV paid to you on stocks and investments
- _____ Forms 1099-R for income received on Pensions/Annuities or other Retirement Income
- _____ Income receipts from rental real estate, royalties, partnerships, S corporation, trusts
- _____ Unemployment Compensation Social Security benefits
- _____ Other Income, Gambling Winnings
- _____ Amount of Stimulus Payment Received \$ _____

Itemized Deductions (Schedule A)

- _____ Medical and Dental expenses
- _____ Receipts from taxes you paid such as state and local taxes, real estate taxes, personal property taxes.
- _____ Form 1098 for home mortgage interest and points
- _____ Receipts for charitable contributions and gifts
- _____ Casualty and theft losses
- _____ Job expenses