

## **Things to Bring when getting your tax return prepared:**

Social Security Numbers and Birthdates for you, your spouse and your dependents

Last Year's Federal and State Tax Return(s) (helpful, but not required)

### **Income (for you, your spouse and/or dependents)**

- W-2 form(s) for wages for the year.
- W-2(G) form(s) for gambling winnings.
- 1099-B form(s) for all stock transactions during the calendar year.
- 1099-C form(s) for cancellation of debt.
- 1099-DIV form(s) for dividends earned during the calendar year.
- 1099-G form(s) for unemployment income and/or refunds for state and local taxes.
- 1099-INT form(s) for interest earned during the year. 1099-INT forms will not be issued when interest earned is less than \$10.00. However, you still need to report the interest as income.
- 1099-MISC form(s) for income performed as an independent contractor. This includes jury duty pay.
- 1099-R form(s) for payments or distributions from an IRA or other retirement plan.
- 1099-S form(s) for income resulting from the sale of property.
- K-1's for partnership or corporate business income.
- SSA-1099 for Social Security benefits received.
- Alimony received in 2015.
- Business or farming income - Profit & Loss Statement and/or capital equipment information

- Rental Property Income - Profit & Loss Statement
- Miscellaneous income - Medical Savings Accounts, Scholarships, etc.

**Adjustments to Income (for you, your spouse and your dependents)**

- 1094-B or 1095-B form(s) for Health Coverage under the Affordable Care Act.
- 1098-E form(s) for student loan interest paid
- 1098-T form(s) for tuition paid to institution of higher learning
- For Teachers - Receipts for expenses paid for classroom supplies
- Records of IRA contributions made during the year
- Receipts for qualifying energy-efficient home improvements
- Records of Medical Savings Account Contributions
- Self-employed health insurance records
- Records of moving expenses
- Alimony paid
- Keogh, SEP, SIMPLE, and other self-employed pension plans

**Deductions and credits (for you, your spouse and your dependents)**

- Child care costs: provider's name, address, Tax ID number and amount paid
- Adoption costs: Social Security Number of child, records of legal, medical and transportation costs.
- Form 1098 for mortgage interest, private mortgage insurance and points you paid
- Investment interest expenses
- Charitable donations - cash amounts, official charity receipts, cancelled checks, value of donated property, miles driven as a volunteer and out-of pocket expenses. Donations of \$250.00 or more should be documented.

- Medical and dental expense records, including the cost of prescription medicine, eyeglasses, dentures, or other necessary equipment, and mileage for doctor and hospital visits. Over-the-counter medication is not deductible.
- Casualty and theft losses - amount of damage and insurance reimbursements
- Business mileage for self-employed individuals or independent contractors
- Union dues
- Unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc)
- Records of home business expenses
- Rental property income and expenses
- Tax Preparation Fees

**Taxes Paid (for you, your spouse and your dependents)**

- State and local income taxes paid
- Real estate taxes paid
- Sales taxes paid
- Personal property taxes
- Vehicle license fees based on value of vehicle
- Estimated taxes for self-employed individuals
- Prior year refund applied to current year and/or amount paid with an extension to file