

What Should I Bring To My Appointment?

Income Sources

- W-2
- Self-employed business income and expenses / 1099-MISC
- Commission you received or paid
- Pension or retirement income / 1099-R
- Unemployment income / 1099-G
- Social Security Income / SSA-1099
- Alimony paid or received
- Lottery or gambling winnings/loses (If you itemize, even if you have winnings, losses may be listed on Schedule A in your favor)

State & Local Taxes

- State or local paid
- State refund amount / 1099-G
- Estimated taxes or foreign taxes paid

Family

- Medical and Dental Expenses
- Child care expenses and provider information
- Mileage records to doctor appointments

Savings & Investments

- IRA Contributions
- Interest and dividend income/ 1099-INT or 1099-DIV
- Statements on stock or bond sales/ 1099-B

Work Expenses (Unreimbursed)

- Uniforms, union dues/expenses, dues to professional societies, licenses and regulatory fees, subscriptions to professional journals/trade magazines, tools/supplies used in your work, occupational taxes, passport for a business trip, travel, transportation, meals, entertainment, gifts and local lodging related to your work.
- Job-related educational expenses

Education Expenses (Unreimbursed)

- Classroom expenses for teachers
- Tuition, books, supplies/equipment needed for a course of study, notebooks, ebooks, education fees, non-academic fees, student activity fees, athletic fees.
- Student loan interest / 1098-E

Other

- Charitable donations, cash and non-cash
- Casualty or theft losses
- Mileage records for travel to and from Goodwill, Salvation Army, charity events, volunteer work, etc.

