

The Tax Place

Items to bring to your tax appointment

- W-2s from all employers
- W-2G Gambling Winnings
- 1099 This document will show income from different sources
- 1099-INT Interest Income
- 1099-DIV Dividends Earned from Stocks/Mutual Funds
- 1099-B Sale of Stocks
- 1099-Misc Income from Independent Contracting
- 1099-R IRA, Pension, 401K or Annuity Pay-outs
- 1099-SSA Social Security income
- 1099-G State Program Payments
- 1099-C Cancellation of Debt
- 1098 Mortgage Interest Paid
- 1098-T College Tuition Paid
- 1098-E Student Loan Interest
- Dependent Care Expenses:
 - (Name, Address, Telephone #, Tax ID #, and amount paid)
- Social Security numbers for all dependents

Additional Items Needed to Complete your Tax Return

- Medical Expenses (plus miles to and from doctor and/or hospital visits)
- Amounts paid to the DMV for vehicle registrations (tax deductible portion)
- Any job required supplies not reimbursed by your employer
- Any investment fee or administration fee
- Mileage for job required miles (excluding mileage to and from worksite and reimbursed mileage)
- Property taxes paid on your primary and/or secondary residence
- Receipted charitable giving amounts
- Sales contract if you purchased a new car, truck, boat, etc...
- Name, address, phone number and tax ID number of dependent care provider
- Last Year's Tax Return (if you are a new client)
- Copies of final escrow statements on any purchases, sales, or refinances of property.

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