

# What to bring to your appointment

## **Suggested List of Items:**

Plate Renewal amounts

Interest and Dividend Statements

Medical and Drug Expenses

W-2's and 1099's

Mortgage Interest Statements

Home Equity or Second Mortgage Statements

Charitable Contributions

Taxable Value of Property

Property Tax Statements for both Summer and Winter

Tuition Paid or Contributions to College Plans

Books and Supplies for college (we can count this year!)

Student Loan Interest Paid

Stock Sale Information

IRA Contributions/Distributions

Travel for Job Search Expenses

Social Security Income Statements

Sales Tax on Large Purchases (Motor Home, Auto, Boat, etc.)

Energy Home Improvements (windows, exterior doors, hot water heaters, etc.)

Unemployment Income Statement

Anything else that looks tax related!