

# The Tax Place

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## Items to bring to your tax appointment

### INCOME:

- W-2 Forms from all employers
- W-2G Gambling Winnings
- 1099 Forms Income from different sources
- 1099-NEC Income from Non-Employee Contractor work
- 1099-DIV Dividends Earned from Stocks/Mutual Funds
- 1099-INT Interest Income
- 1099-B Sale of Stocks, etc.
- 1099-SSA Social Security Income
- 1099-G Income from state programs such as unemployment, state refunds,
- 1099-C Cancellation of Debt

### DEPENDENTS & MISC

- Social Security number and birthdate of all dependents
- Dependent Care Expenses  
Name, Address, Telephone #, Tax ID#, and amount paid
- Form 1098-T College Tuition paid
- Form 1098-E Student Loan Interest paid

### DIRECT DEPOSIT INFO

- Bank Routing and Account numbers

### DEDUCTIONS

- Medical and Dental Expenses – If over 7.5% of your gross income/Includes Mileage
- DMV – Amounts paid for registrations (tax deductible portion)
- Mortgage Interest Paid – Form 1098 and other -- First and Second home (some limits apply)
- Property Taxes paid
- Charitable Giving – 2 Categories. 1. Cash/Check or Equivalent. 2. Goods (receipted if over \$250)
- Sales Tax - Contract on purchase of car, truck, boat, motorhome, etc.
- Final escrow settlement or disclosure statement on purchase, sale or refinance of property
- Any job required supplies/expense not reimbursed by employer. (Calif deductible)
- Energy Efficient Home Improvements

### MEDICAL INSURANCE

- Mandatory for California Residents
- FORM 1095A – Premium Tax Credit – if your medical is “Covered California”

LAST YEARS TAX RETURN – If you are a new client

**\*\* Please see our website for other checklists for business, rental property & special occupations.  
[www.thetaxplace.us](http://www.thetaxplace.us)**

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