

Possible Documents you may need

Last Year's Tax Return and all supporting documentation, bring the whole envelope if we prepared your taxes.

Income Examples

W-2
1099R
SSA-1099 or RRB-1099
W-2G (Gambling Winnings)
1099-Misc
1099G (State Tax Refund – *from states other than Florida*)
Unemployment Earning statement
Interest and Dividend Statements
Broker statements (including cost basis paid for any stock sales)
Alimony received

Payment Examples

Documentation of estimated tax paid
Alimony paid (recipient SS#)

Deductions Most taxpayers have a choice of taking either a standard deduction or itemizing their deductions. If you have a substantial amount of deductions, you may want to itemize. You will need to bring the following items:

Property Tax Statement (showing both Ad-Valorem and Non-Ad-Valorem)
Receipt for sales tax paid on a new vehicle
Mortgage Interest Statement
Medical/Dental Bill payments including any documented mileage incurred (See below for worksheet)*
Receipts for charitable donations – cash** and/or non-cash (we can't do the deduction without the receipt)

Credits

Dependent Provider Care Information (name, Fed ID# or SS#, address, amount paid)
All money paid to higher education institution for education credit (1098T)
Amounts contributed to individual retirement savings

*Medical/Dental Out Of Pocket

Doctor Bills _____
Dentist Bills _____
Vision/Glasses _____
Prescriptions _____
Hearing Aids _____
Lab Fees/XRays _____

**Charitable Cash Donations

United Way _____
Red Cross _____
Church _____
Other _____
Other _____
Other _____