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## WHAT SHOULD I BRING TO MY TAX APPOINTMENT?

### **Existing & New Clients:**

- W2's, 1099's (including Interest Income/Dividend Income, Pension disbursement and withdraws)  
And 1099B (Sales of Stocks)
- SS#'s for Newborns
- Day Care Providers w/Tax ID#'s
- Mortgage Interest Paid (all 1098 forms)
- Property Taxes Paid
- Purchased a New home or Refinanced – Need Final Closing/Statement (It's the one that list all the fees, if you can't find a copy, call your escrow company and they will email or fax it to you)
- Education Expenses (Form 1098T – Tuition & Fees)
- Student Loan Interest Paid
- DMV fees (Registrations for all Cars, boats, trucks, trailers, motorcycles, etc...)
- Work related expenses (see Checklist Link)
- If you have a small business, know your gross sales(receipts) and expenses (see Checklist Link)

### **New Clients Only:**

- All of the Items above
- Last year's tax return – If you can't find the return, I'll need the amount of any additional State taxes owed or refund received from the previous year.
- Names, Date of Birth and Social Security #'s of all dependents