

What To Bring To Your Tax Appointment

Personal Taxes

Personal & Dependent Information

- Driver's License(s) & Social Security card(s)
- Dependent's Social Security cards and birth dates

Income

- Wage statements/W 2s
- Self-employment business income and expenses (1099 MISC)
- Pension, retirement income/1099 R
- Unemployment income/1099 G
- Social Security income/SSA 1099/RRB 1099
- Commissions received/paid/1099's
- Statements on the sales of stocks or bonds/1099 B
- Interest and dividend income/1099 INT/1099 DIV/1099 OID
- Lottery or gambling winnings/losses/W2 g
- State refund amount/1099 G
- Alimony paid or received and ex-spouse info
- Income and expenses from rental properties

Deductions

- Form 1098 Mortgage or home equity loan interest
- Real estate and personal property taxes
- Child care expenses and provider information (Federal ID Number)
- Medical and dental expenses (also miles)
- Cash and non-cash charitable donations
- Home purchase closing statement/HUD
- Casualty or theft losses
- IRA contributions/Form 5498
- State or local taxes paid
- Estimated taxes or foreign taxes paid
- Car purchase paperwork showing sales tax
- Record of purchase or sale of your house
- Unreimbursed job related expenses
- Educator expenses
- Tuition and Education Fees/1098 T
- Student loan interest/1098 E

Miscellaneous Items

- Last year's Federal and State tax return
- 1095 A* If purchased health insurance through the Health Insurance Marketplace
- Canceled Debt Amount/1099 C

Business/Corporate Taxes

Income (Totaled)

- Gross receipts from sales or services
- Refunds>Returns
- Business checking/savings account interest (1099 INT or statement)
- Other income

Inventory (if applicable)

- Beginning inventory
- Inventory purchases
- Ending inventory

Expenses

- Refer to the Business Income and Expense Organizer at Taxforjax.com

Employee & Subcontractor payments

- 1099's MISC and 1096
- W3/W2's from Payroll Company
- Federal and state payroll returns (Form 941's, 940, UCT6's, etc.)

Assets & Equipment

- Cost and acquisition date of assets
- Sales price and disposition date of any assets sold
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Interest Expense

- Mortgage interest on building owned by business
- Business loan interest
- Auto Loan Interest
- Business Equipment Loans

Miscellaneous Items

- Last year's Federal and State tax return