

What to bring to your appointment? - (Individual)

- Copy of Social Security Card(s) or TIN (new clients)
- Driver's License(s) (new clients)
- Dependents' SSNs or TINs & Dates of Birth
- Copy of Federal and State Tax Returns for the last 2 years (new clients)
- All W-2, 1099, 1098, K1 and other tax forms you have received
- Health coverage information - 1095 form
- Self-Employed Business Income and Expenses (PL statement)
- Income and Expenses from Rentals
- Lottery or Gambling Winnings and Losses
- IRA Contributions or Conversions
- Alimony Paid or Received
- Child Care Expenses and Provider Address, and EIN
- Medical, Eye Care, and Dental Expenses
- Cash and Noncash Charitable Donations
- Record of Purchase or Sale of Residence
- Qualified Motor Vehicle Taxes
- Unreimbursed Employment-Related Expenses
- Job-Related Educational Expenses
- Tuition and Education Fees
- Casualty or Theft Losses
- Estimated Taxes Paid
- Foreign Taxes Paid