

**Please bring with you the following:**

- Last year's Federal and State tax returns (for new clients)**
- The names and birth dates of everyone in your household (you, your spouse and any children born before the end of the tax year.)
- Social Security Cards for your children, yourself, your spouse, and all other dependents and family members. You must bring everyone's Social Security card.
- If you want your refund directly deposited to your checking account, bring a voided blank check. If you want your refund directly deposited to your savings account, bring your bank routing number and your savings account number. Make sure the bank's name and the routing number are current and correct.
- Income/Wage statements:
  - W-2's
  - 1099's (1099-INT, 1099-B, 1099-DIV, 1099-G, 1099-C, 1099-MISC)
  - Alimony received or paid
  - Commissions received statement
  - Brokerage account year-end statements (1099-B)
  - Bank Interest statements (1099-INT)
  - Stock options sale papers
  - Rental property income and expenses
  - Partnership (K-1 Form), S Corp, trusts, or estate yearly statements
  - Pension or retirement income statements (1099-R)
  - Social security income yearly statement (1099-SSA)
  - Unemployment income yearly statement (1099-G)
  - State income tax refund statement (1099-G)
  - Lottery winnings (and lottery losses, if you have winnings)
- Car, motor home, and boat registration paperwork
- Donation receipts
- IRA contributions



## What to Bring for Your Tax Preparation

Phone: (201)758-8777

- Child care expenses and provider information (Must bring provider's name, address, phone number, EIN or SSN, amount paid)
- Medical expenses (They must total up to be more than 7.5% of your total income. If unsure, please bring all your receipts/bills and I'll help you figure it out)
- State taxes paid
- Unreimbursed employment-related expenses
- Job-related educational expenses
- Casualty or theft losses
- Foreign taxes paid

### **Homeowners**

- Mortgage interest year-end statement (Form 1098)
- Home equity year-end statement
- Property tax information
- If you sold your home, purchase and home improvement information
- Settlement Sheet (if you purchased a home this year) to compute deductible closing costs

### **Businesses**

- Income and expense reports
- Mileage logs for autos
- Receipts for business assets purchased

### **Students**

- Tuition and education fees
- Student loan information (1098-E)
- Grants and scholarship information