

What to bring to your tax preparation meeting

- Wage statements/W2s
- Pension, retirement income/1099-Rs
- Interest and dividend income statements
- Commission Statements
- Sales of stock or bonds
- Self-employed business income and expenses
- Lottery or gambling winnings/losses
- State refund amount
- Social Security/Unemployment Income
- Income and Expenses from rental properties
- Alimony paid or received
- Record of purchase or sale of residence
- Medical and dental expenses
- Real estate and personal property taxes
- Real Estate Closing Statement
- Form 1098 – Mortgage Interest Statement
- Estimated taxes or foreign taxes paid
- Unreimbursed employment-related expenses
- Job-related educational expenses
- Childcare expenses & provider information
- Social security card(s)
- Driver's License(s)
- Dependents' social security numbers and dates of birth
- Last year's tax return