What to Bring to Your Tax Appointment

Every taxpayer's situation is unique, and thus it is impossible to list all the items one must bring in for a tax appointment for every type of tax situation. When in doubt, bring the item in question to your tax appointment. Your tax organizer is a great resource to complete prior to coming to your appointment. The following is a good general list of the items to bring in with you for your scheduled tax appointment (all of which is included in your tax organizer, if applicable):

- Prior Year Tax Return Copy (state returns if applicable) if a new client
- Updated address/contact information
- Any tax notices/correspondence received
- Social Security or ITIN Numbers with date of births for anyone who'll be on your tax return
- Childcare payment records with licensed provider's ID number(s)
- Amount of any alimony payments with ex-spouse SSN
- Income Statements
- Bring any & all W-2, 1098, 1099, social security benefits, & schedule K-1 forms
- Purchase date & total investment for any stocks or property sold
- Education scholarships or fellowships
- HSA contributions/distributions
- Record of healthcare coverage (Form 1095-A, 1095-B, 1095-C, or health insurance exemption certificate)
- Itemized Deductions
    - If you are planning to itemize your deductions (Schedule A), please compose a spreadsheet/list summarizing them in your organizer. Itemized deductions include:
        - Mortgage interest, real estate & personal property tax records
        - Amounts of state & local income tax paid in prior years
        - Records of cash donations to religious institutions, schools & other charities
        - Records on non-cash charitable donations (including date, donation location, value of donations)
        - Stock donations (including date, charity name, value of donation)
        - Out of pocket medical expenses
        - Sales tax paid on large purchases
        - Amount of any qualified charitable distributions (from an IRA)
- Records of any contributions to IRAs & other retirement plans
- Records of tuition and other higher education expenses (books, computers, etc)
- Property sale HUD documents
- Self-Employment: Please prepare a simple 1 page income statement or complete in your organizer which summarizes your:

    - Gross self-employment income for the tax year and your applicable expenses categorized and summarized by the type of expense (i.e. advertising, equipment, supplies, etc)
    - Self-employed health insurance paid
- Rental Property: If you received income from rental property (Schedule E), please prepare a simple 1 page income statement or complete your organizer showing:
    - Gross rental income you received during the tax year
    - Your applicable expenses categorized and summarized by the type of expense (i.e. advertising, mortgage interest, real estate taxes, repairs, maintenance, condominium fees, etc.).
    - Any personal use days
- Business Use of Home: If you used a portion of your home for business use, please provide:
    - Square footage calculation of the area used for business
    - The date you began using the space for business
    - Summary of your utility expenses (gas, electric, oil, condo fees, landscaping, snowplowing, maintenance, etc)
    - Major home improvements and direct office expenses (repairs, business phone, etc).
- If you would like your refund directly deposited into your bank account please provide the following:
    - Bank name
    - Account number
    - Routing number
    - Specify if checking or savings account
- Estimated Tax Payments and Extension Payments
    - Please confirm date and amount of tax payments made during the year
- Foreign Income
    - Highest balance in foreign account during year
    - Interest income earned
    - Name of foreign bank, address of foreign bank, foreign bank account number