



ITEMS TO BRING TO YOUR TAX INTERVIEW

General Information

- Legal Names - Taxpayer, Spouse & Dependents
- Date(s) of Birth - Taxpayer, Spouse, Dependents
- Home or Mailing Address
- Social Security #'s - Taxpayer, Spouse, Dependents
- Occupations - Taxpayer & Spouse
- Tax Returns - copies of previous 2 years

Income Information

- Wage Statements (W2's)
- Sub-contractor or Self-Employed (1099-MISC)
- State Tax Refund from previous tax year
- Unemployment (1099-G)
- Social Security Statements (1099-SSA)
- Alimony Received
- Interest Income (1099-INT)
- Dividend Income (1099-DIV)
- IRA, 401K or Retirement Distribution (1099-R)
- Sale of Home (1099-S)
- Capital Gains & Losses - Stocks & Bonds (1099 B)
- Rental Property Income
- Income from S Corp, Partnerships (K1's)
- Other Income

Expense Information

- Self-Employed - Profit & Loss Statement, Balance Sheet
- Estimated Taxes Paid - Federal & State
- Mortgage & Home Equity Statements (Form 1098)
- Real Estate Taxes Paid
- Personal Property Taxes (VLF or DMV)
- Student Loan/College Tuition Statements (1098-T)
- IRA Contribution Information (Traditional, SEP & Roth)
- Health & Dental Insurance Premiums Paid
- Out of Pocket Medical & Dental Expenses, Medical Mileage
- Charitable Contributions (Cash & Non-Cash, Charitable Mileage)
- Lottery or Gambling Winnings or Losses
- Rental Property Expenses
- Child Care Expenses & Provider Information
- Unreimbursed Employee Expenses
- Moving Expenses
- Alimony Paid