# Checklist To Bring With You To Tax Appointment

1. **Last Year's Tax Returns**: If not prepared by us, copies of federal and state tax returns filed for the previous year are crucial.
2. **Personal Information**:
    - Social Security numbers (or taxpayer identification numbers) for themselves, their spouse, and any dependents.
    - Dates of birth for all individuals included on the tax return.
    - Legal names and any changes made during the tax year.
3. **Income Statements**:
    - W-2 Forms: These show wages, salaries, and tips earned from employment.
    - 1099 Forms: Including 1099-INT for interest income, 1099-DIV for dividend income, 1099-G for government payments, 1099-R for distributions from retirement accounts, and any other relevant 1099 forms.
    - Self-Employment Income Records: Such as 1099-NEC for non-employee compensation, income and expense records for businesses, and records of any income received in cash.
    - Rental Income Records: Including records of rental income received, expenses incurred, and depreciation claimed.
4. **Investment Income**:
    - Brokerage Statements: Summarizing investment transactions, dividends, interest income, and capital gains or losses.
    - K-1 Forms: If the client is a partner in a partnership, a shareholder in an S-corporation, or a beneficiary of a trust, they will need to provide K-1 forms reporting their share of income, deductions, and credits.
5. **Other Income Sources**:
    - Social Security Benefits Statement (Form SSA-1099).
    - Pension or Annuity Income Statements.
    - Unemployment Compensation Statement (Form 1099-G).
6. **Deductions and Credits Documentation**:
    - Mortgage Interest Statement (Form 1098).
    - Property Tax Records.
    - Charitable Contribution Records.
    - Medical Expense Records.
    - Education Expenses: Including tuition statements (Form 1098-T) and records of education-related expenses.
    - Retirement Contributions: Such as contributions to IRAs or employer-sponsored retirement plans.
7. **Healthcare Coverage**:
    - Form 1095-A, 1095-B, or 1095-C: Statements providing information about health insurance coverage.
8. **Miscellaneous**:
    - Records of any estimated tax payments made during the tax year.
    - Records of any additional income or deductions not already covered.

We encourage you to organize these documents before your appointment to ensure a smooth and efficient tax preparation process. If they have any specific questions about what to bring, they can always reach out for clarification at 860.440.7575.