

What do you need to bring with you when you have your taxes prepared?

Identifying Documents

- Photo identification for the primary taxpayer and spouse (it is okay if it is expired)
- Social Security Cards for you, your spouse and dependents who will be listed on the return (or a Social Security Number verification letter issued by the Social Security Administration)
- If you do not have a Social Security Number your Individual Taxpayer Identification Number (ITIN) assignment letter for you, your spouse and dependents
- Birth dates for you, your spouse, and dependents who will be on the tax return

Income Documents from 2011

- Forms W2 from all jobs worked in 2011 for everyone who will be on the tax return
- Scholarships received (Form 1098-T)
- Forms 1099-MISC from self-employment or contract work
- Forms 1099-INT (interest) or Forms 1099-DIV (dividends)
- Forms 1099-G (unemployment compensation)
- Forms SSA-1099, RRB-1099 (Social Security or Railroad Retirement Benefits)
- Forms 1099-R (Disability income)
- Forms 1099-R (Distributions from Pensions, Annuities, and/or IRA)
- Forms 1099-MISC from other income like gambling, lottery, prizes and awards
- Written documentation of income received from tips

Expenses in 2011

- Total paid for daycare provider and the daycare provider's tax identifying number (the provider's Social Security Number or the provider's business Employer Identification Number)
- If you're self-employed, a written record of expenses for your business in 2011
- Property tax receipt
- Mortgage interest statement (Form 1098)
- Tuition paid (Form 1098-T)
- Interest paid on student loans (Form 1098-E)
- Alimony paid
- Retirement contributions
- Charitable contributions
- Health Savings Account deduction or payment
- Forms 1099-S, 1099-B; Income or loss from sale of stocks
- Form 1099-A; foreclosure of home
- Form 1099-C; cancellation of debt

Helpful Documents

- A copy of last year's federal and state returns *if available*
- Anything else you think may be helpful to prepare your return – when in doubt, bring it!

And Bring Your Spouse!

To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms. If only one spouse is present, we will prepare a paper return.