

**Bring the following to your appointment:**

- Last year's income tax return
- SS cards or other official documentation for yourself and all dependents
- Checkbook (for direct deposit of any refund)

**Proof of Income:**

- W-2 from each employer
- Unemployment compensation statements
- SSA-1099 form showing total SS benefits paid to you for the year or Form RRB-1099, Tier 1 Railroad Retirement benefits
- 1099 forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets
- 1099-R form from a pension or annuity, especially if a portion was withheld for income tax purposes
- 1099-MISC form showing any miscellaneous income

**Payments:**

Bring all forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments).

**Deductions:**

Most taxpayers can choose between the standard deduction and itemizing deductions. If you have a substantial amount of deductions, you may want to itemize.

If you do, bring the following:

- 1098 form showing any home mortgage interest
- Receipts or canceled checks for medical-dental expenses (including doctor and hospital bills and medical insurance premiums), receipts for prescription medicines, costs of assisted living services and bills for home improvements, such as ramps and railings for people with disabilities
- Receipts for contributions to charity
- Receipts or canceled checks for all tax income and property taxes you paid, as well as records of tax refunds

**Credits:**

- Dependent care provider information (name, employer ID or SS #)
- Receipts, canceled checks or 1099 forms related to continuing education