What should I bring to my tax return appointment?

If you are a new client, please bring the following:

- Original Social Security cards for yourself, your spouse, and your dependents
- Copy of last year's tax return
- Voided check or other note with the financial account and routing numbers, if you want to use direct debit or deposit for tax payment or refund

For both new and returning clients, bring:

1. Records of all income received during the tax year such as:
   - W-2s for wages, 1099s for interest, dividends, retirement distributions, unemployment, state income tax refunds, etc.
   - Tip income records
   - Records of gambling profits and losses
   - Cash income received record, such as from odd jobs and tips
   - Alimony received
   - Capital gains and losses records, such as brokerage account annual statements
   - Form K-1s from any estates, partnerships or S-corporations. These usually are not sent out until March.
2. Amount of IRA contributions
3. Amounts paid for child care and to whom (name, address, SSN)
4. Tuition and other education expenses paid for yourself, spouse, and/or dependents
5. Student loan interest paid
6. Record of any estimated taxes paid to IRS or a state
7. Property tax receipts
8. Form 1098 (or other) reporting home mortgage interest
9. Receipts or record of medical, drug, and dental unreimbursed expenses, including medical insurance or long term care insurance premiums
10. Itemized record of charitable gifts. Any over $500 must include a signed receipt from the charity.
11. Any records related to starting or operating your own business, including rental property