

What to bring to your appointment

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- **Proof of identification (photo ID)**
- **Social Security cards for you, your spouse and dependents or a Social Security number verification letter issued by the Social Security Administration**
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- Copies of brokerage statements, Form 1099B, Form 1099-Div, Form 1099-Int, K-1)
- Copies of any Forms 1099-C for cancellation of debt
- Interest and dividend statements from banks (Forms 1099)
- **A copy of last year's federal and state returns, if available**
- **Proof of bank account routing and account numbers for direct deposit such as a blank check**
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- Forms 1095-A, B or C, Affordable Health Care Statements
- Copies of income transcripts from IRS and state, if applicable
- Copies of Bill of Sale for major purchases (automobile, boat, house, etc.)
- Copies of records showing mortgage payments and property taxes paid in 2015.
- Record of State and Federal Estimated Tax Payments made.
- Copies of all 2015 automobile registrations showing ownership or property tax paid.
- Acknowledgements for Charitable Cash Donations made (over \$250)
- **An inventory of and value for all non-cash items donated to charitable organizations. (If the total value exceeds \$500 you need to see a professional tax preparer.)**
- **If you have a small business with a loss, we cannot help you. Seek the advice of a professional tax preparer.**