

Tax Clients Should Bring the Following:

A. Personal Information

Valid Picture ID (Driver's License or State ID)
Your social security number
Your spouse's full name and social security number
Amount of any alimony paid and ex-spouse's social security number
For Direct Deposit Bank or Credit Union name, routing number and account numbers

B. Dependents Information

Social Security Cards for all claimed dependents
Dates of birth and social security numbers
Childcare records (including the provider's ID number) if applicable
Approximate income of other adults in your home (not spouse, if you're filing jointly)

C. Proof of Income

Wages (all Forms W-2)
Unemployment (Form 1099-G)
Gambling/Lottery Winnings (Form W-2G)
Miscellaneous Income (Form 1099-Misc)
Pension (Form 1099-R)
Social Security Benefit (Form 1099-SSA)
Supplemental Security Income (Form 1099-SSI/Form 1099-SSD), Letter from SSA
Social Security Disability (1099-SSDA)
VA total monthly benefit or sum for the year from the Dept. of Veterans Affairs
Interest and Dividends (Form 1099-INT and/or 1099-DIV)
Other relevant information about income

D. Self-Employment Information

Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s.
Records of all expenses — check registers or credit card statements, and receipts
Business-use asset information (cost, date placed in service, etc.) for depreciation
Office in home information, if applicable
Total miles driven for the year (or beginning/ending odometer readings)
Total business miles driven for the year (other than commuting)
Amount of parking and tolls paid
If you want to claim actual expenses, receipts or totals for gas, oils, licenses, personal property tax, lease or interest expense, etc.

E. Rental Income

Records of income and expenses
Rental asset information (cost, date placed in service, etc.) for depreciation

F. Education Payments

Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid
Forms 1098-T and 1098-E

Tax Clients Should Bring the Following:

G. Proof of Personal Expenses

Medical or HMO Premiums paid for self and/or family dependents
Total amount paid for day care and the day care provider's tax identification number
Student Loan Interest, Tuition and course materials.
Proof of taxable value of your home and bills of property taxes paid in 2012.
Mortgage Interest (Form 1098)
Unreimbursed Employee Expenses

H. Retirement Income

Pension/IRA/annuity income (1099-R)
Social security/RRB income (1099-SSA, RRB-1099)

I. Savings and Investments

Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
Income from sales of stock or other property (1099-B, 1099-S)
Dates of acquisition and records of your cost or other basis in property you sold

J. Other Income

Unemployment, state tax refund (1099-G)
Gambling income (W-2G or records showing income, as well as expense records)
Amount of any alimony received and ex-spouse's name
Health care reimbursements (1099-SA or 1099-LTC)
Jury duty records
Hobby income and expenses
Prizes and awards

K. Itemizing Deductions

Forms 1098 or other mortgage statements
Amount of state and local sales tax paid
Real estate and personal property tax records
Invoice showing amount of vehicle sales tax paid
Cash amounts donated to houses of worship, schools, other charitable organizations
Records of non-cash charitable donations
Amounts paid for healthcare insurance and to doctors, dentists, hospitals
Amounts of miles driven for charitable or medical purposes
Expenses related to your investments
Amount paid for preparation of your 2011 tax return
Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
Job-hunting expenses

L. IRA Information

Amount contributed for 2012
Traditional IRA basis
Value of IRAs on Dec. 31, 2012

M. New Client Information

Copy of last year federal and state tax returns