

Bring the following (if applicable):

Personal Information for Each Family Member

(Check off if completed)

- Last Year's Tax Return
- Name
- Date of Birth
 - Birth Certificates for EIC
- Social Security Card /ITIN/ATIN
- Valid Driver's License

Income and Tax Information

(Check off if completed)

- W-2's
- Interest (1099-INT or substitute\
- Dividend Slips (1099-DIV or Broker Statement)
- Self-Employment Income and Expenses
- Sale of a Personal Residence
- Rental Income and Expenses
- Sale of any Business Assets
- Gambling or lottery Winnings
- State Income Tax Refund
- Pension Income (1099-R)
- Estimated Taxes Paid
- Social Security or Railroad Retirement
- Unemployment Compensation
- Miscellaneous Income (1099-MISC)
- IRA or 401 (k) Distribution

Deductions/Adjustments

(Check off if completed)

- Medical Expenses
- Real estate or personal property tax
- Mortgage Interest
- Charitable Contributions
- Employee Business Expenses
- Gambling Losses
- Moving Expenses
- Traditional IRA Contributions
- Higher Education Expenses
- Educator Expenses
- Student Loan Interest

Tax Credits:

(Check off if completed)

- Child Care Provider/ Address and Employer Identification Number (EIN) or Social security Number (SSN)
- Adoption Expenses
 - Expense Receipts
 - Adoption Papers
- Retirement Savings Contributions
- Earned Income Credit (EIC)
 - Letter from School
 - Medical Records
 - Birth Certificates