

Here's what you'll need to bring with you to your tax appointment:**Appointment Date:** _____ **Appointment Time:** _____

- Proof of identification (Drivers License, Government issued Photo I.D.).
- Social Security Cards for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration. If you or your dependent is not eligible to get a Social Security Number, you may need to obtain an Individual Taxpayer Identification Number (ITIN). We can help you do this.
- Birth dates for you, your spouse and any dependents on the tax return.
- Wage and earning statement(s) Form W-2, W-2G, and 1099-R, from all employers and payers. If you have not received your Forms W-2 from your employer and want to know what to do, we can help. Call us.
- Self-employed business income and expenses - Forms 1099-MISC and 1099K.
- Records of job-related educational expenses and un-reimbursed employment related expenses.
- Interest and dividend statements - Forms 1099-INT and 1099-DIV.
- Social Security, State Income Tax refund and Unemployment Compensation statements - Forms SSA-1099 and 1099-G.
- Information on Broker and Barter Exchange Transactions - Form 1099-B.
- Records of lottery or gambling winnings and losses.
- Records of rental income and expenses, IRA contributions, and alimony paid or received.
- Mortgage Interest Statement - Form 1098 (including home equity loans); and records of the purchase or sale of your residence.
- Records of real estate and personal property taxes paid.
- Records of state or local taxes paid (including sales tax*).
- Records of canceled debt amounts - Form 1099-C.
- Records of medical, eye care and dental expenses.
- Receipts for cash and non-cash charitable contributions.
- Tuition and Education Fees paid - Form 1098-T; and Student Loan Interest paid - Form 1098-E.*
- Records of educator expenses paid.*
- Records of moving expenses paid and any casualty or theft losses.
- Total amount paid for a day care provider and the day care provider's tax identifying number - the provider's Social Security Number or Employer Identification Number.
- Records of any qualified energy efficient home improvements paid.*
- Health Insurance Marketplace Statement - Form 1095-A.**
- Health Coverage Statements from your Insurer or Employer - Form 1095-B/1095-C.
- Records of federal and state estimated taxes and foreign taxes paid.
- A copy of last year's federal and state tax returns, if available.
- To file taxes electronically on a married filing joint tax return, both spouses must be present to sign the required forms.

* This provision has expired, but may be extended by Congress, so bring it.

** If you purchased health insurance through a Federal or a State Marketplace.