Below are a list of items you will need to bring to your appointment. If you are a new client, we have highlighted the MANDATORY documents.

1. Wage Statements/W2s
2. Self-employment business income and expenses/1099-MISC
3. Commissions received/paid
4. Pension, retirement income/1099-R
5. Unemployment income/1099-G
6. Canceled Debt Amount/1099-C
7. Social Security income/SSA-1099
8. IRA contributions
9. Statements on the sales of stocks or bonds/1099-B
10. Interest and dividend income /1099-INT/1099-DIV
11. Lottery or gambling winnings/losses
12. State refund amount/1099-G
13. Income and expenses from rentals
14. Alimony paid or received
15. Record of purchase or sale of residence
16. Medical and dental expenses
17. Real estate and personal property taxes
18. State or local taxes paid
19. Estimated taxes or foreign taxes paid
20. Cash and non-cash charitable donations
21. Mortgage or home equity loan interest paid/1098
22. Unreimbursed employment-related expenses
23. Job-related educational expenses
24. Educator expenses
25. Tuition and Education Fees/1098-T
26. Student loan interest/1098-E
27. Casualty or theft losses
28. Child care expenses and provider information
29. **Social Security card(s)**
30. **Driver's License(s)**
31. **Dependents' Social Security numbers and dates of birth**
32. **Last year's Federal and State tax return (if you are a new client)**