

# What Should I bring to my Tax Appointment?

## Identification:

- Social Security cards for self, spouse and dependents\*\*
- State/Federal issued photo identification for self (and spouse if filing jointly)\*\*
- Bank routing and account numbers (for direct deposit)
- Copy of prior year's tax return, if available

*\*\*Your taxes cannot be prepared without photo identification and social security cards*

*If filing jointly, both spouses must be present*

## Income Statements:

- All wage and earnings statements, for example: W-2 Form, SSI, Pension, IRA, Annuity, Unemployment,
- Broker statements if you sold stock
- Social Security Income (SSA-1099)
- 1099-MISC if you were self-employed

## Adjustments/Deductions:

- Child care provider taxpayer identification numbers (TINs) and total amount paid
- Proof of tuition and education expenses paid (Form 1098-T)
- Proof of student loan interest paid
- Medical expense receipts, including mileage (Form 1095-A for insurance purchased through the Healthcare Marketplace)
- Charitable contributions receipts
- Mortgage interest (Form 1098)
- Heating bills from previous year or Home Heating Credit amount from gas/fuel company
- Homeowners:** Summer & Winter property tax bills for previous year
- Renters:** landlord's name and address and proof of rent paid in previous year
- Self-employed:** Bring receipts, mileage, etc.