



What to Bring to Your Appointment

- Social Security card(s)
- Driver's License(s) / State Issued ID(s)
- Dependents' Social Security numbers and dates of birth*
- Wage statements
- W-2s
- Last year's Federal and State tax return
- Self-employment business income and expenses/1099-MISC*/1099K
- Commissions received/paid*
- Pension, retirement income/1099-R*
- Unemployment income/1099-G*
- Canceled Debt Amount/1099-C*
- Social Security income/SSA-1099*
- IRA contributions*
- Statements on the sales of stocks or bonds/1099-B *
- Interest and dividend income/1099-INT/1099-DIV*
- Lottery or gambling winnings/losses*
- State refund amount/1099-G*
- Income and expenses from rentals*
- Alimony paid or received*
- Record of purchase or sale of residence*
- Medical and dental expenses*
- Real estate and personal property taxes*
- State or local taxes paid
- Sales tax paid**
- Estimated taxes or foreign taxes paid*
- Cash and non-cash charitable donations*
- Mortgage or home equity loan interest paid/1098*
- Unreimbursed employment-related expenses*
- Job-related educational expenses*
- Educator expenses**
- Tuition and Education Fees/1098-T**
- Student loan interest/1098-E*
- Moving expenses*
- Casualty or theft losses*
- Child care expenses and provider information*
- Receipt(s) for qualified energy efficient home improvements**
- Form 1095-A (Health Insurance Marketplace Statement)***
- Form 1095-B/1095-C - Health Coverage Statements from Insurer/Employer
 - If Applicable
- ** Provision has expired. May be extended by Congress.
- Bring just in case.
- *** If purchased health insurance through the Federal or a State Marketplace.