

What should you bring/ drop off for your taxes??

- Social security numbers and birthdays for everyone on the return (you, spouse, kids, parents, etc.)
- All forms that say: W-2, 1098, 1099, or (Schedule) -1
- Last year's tax return, only if you're a new customer
- Records to support childcare and higher education costs
- Income and expense records for work you performed (not on a W-2 or 1099)
- Purchase date and your total investment in any stocks or other property you sold
- Records of other income (rental, jury duty, gambling, hobby, alimony, etc.) and expenses, if applicable
- Records of any contributions you made to IRA's or other retirement plans
- Records for real estate and personal property tax
- Amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for health-care insurance and doctors, dentists, hospitals, etc.
- Number of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparing your tax returns
- Employment-related expenses (dues, travel, publications, tools, uniform cost and cleaning)
- Job-hunting expenses
- Amount of state/local income tax paid