WHAT TO BRING TO YOUR TAX INTERVIEW

NEW CLIENTS ONLY		☐ Child Care Expenses/Documentation
☐ Last Three Years Tax Returns		☐ DMV Fees Paid on Vehicles
☐ Your/Spouse/Dependent's SSNs		☐ Interest Paid (Mortgage, Car, Etc.)
☐ U.S. Tax ID Number for non-citizens who must file		☐ Taxes Paid (Real Estate, Sales, etc.)
☐ Birthdate Info. (You, Spouse, Dependents)		☐ Medical & Dental Expenses
☐		☐ Work-Related Expenses/Mileage Log
ALL CLIENTS (NEW & RETURNING)		☐ Estimated State & Federal Payments
☐ All W-2, 1099s & 1098s		☐ Purchase or Sale of Residence Records
☐ Interest & Dividend Income		☐ Charitable Donations
☐ Pension & Retirement Income		☐
☐ Gambling Winning & Losses		☐
☐ Social Security/Unemployment Ins.		**FOR BUSINESS/RENTAL CLIENTS**
☐ Alimony Paid or Received		☐ Self-Employment Income & Expenses
☐ State/Local Refunds or Amount Due		☐ Income & Expense From Rentals
☐ Stock Purchase & Sale Cost/Dates		☐ Office-In-Home Information
☐ Year-End IRA, 401K Statements		☐ Mileage Log/Vehicle Information
☐ Education Expenses/Student Loan Interest		☐
☐ Legal Documents, divorce, adoption, custody		☐
☐ Moving Expenses		☐
☐		☐

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