



## What Do I Need to Bring to My Tax Appointment?

<b>Personal Information</b>	HUD Statement showing closing date of home purchase*
Social Security card(s) for yourself and spouse	Mortgage or home equity loan interest paid/1098*
Driver's License(s) for yourself and spouse	Cash and non-cash charitable donations*
Dependents' Social Security cards and dates of birth*	Miles driven for charitable/medical purposes
<b>Health Insurance</b>	Moving expenses (only for active duty military)
Form 1095-A (Health Insurance Marketplace Statement) **	Child care expenses and provider information (including provider's Tax ID)
Form 1095-B or 1095-C (From Employer)	
Exemption Certificate Number ***	
<b>Income</b>	<b>Education Payments</b>
W-2s	Tuition and Education Fees/1098-T
Income received for contract labor/other miscellaneous income 1099- MISC*	Student loan interest/1098-E*
<b>Other Income</b>	<b>Self-Employment</b>
Unemployment income/1099-G*	Self-employment business income and expenses/1099-MISC*/1099K
Canceled Debt Amount/1099-C*	Records of ALL expenses related to business -
IRA contributions*	cancelled checks, bank/credit card statements/receipts
Statements on the sales of stocks or bonds/1099-B *	Business-use asset information (cost, date placed in service) for depreciation
Interest and dividend income/1099- INT/1099-DIV*	<b>Rental Income/Expenses</b>
State refund amount/1099-G*	Rental Income 1099-MISC or records of income
Lottery or gambling winnings/losses*	Proof of expenses associated with rental home
<b>Retirement Income</b>	Rental Asset Information (cost, date purchased, etc.) for depreciation purposes
Social Security income/SSA-1099*	<b>Proof of Dependency for Dependents*</b>
Pension, retirement income/1099-R*	Birth certificate (if you are listed as parent)
<b>Deductions/Credits</b>	A letter from the child's doctor or school—on the doctor's or school's letterhead with the child's name and your address.
Medical and dental expenses*	<b>Proof of Dependency for Head of Household Filing Status*</b>
State or local taxes paid	
Real estate and personal property taxes*	Mortgage or home equity loan interest paid/1098*
Sales tax paid on large purchases (car, boat, etc.)	Utility Bill

\* If Applicable

\*\*If you received health insurance from Marketplace

\*\*\*If you received an exemption from needing health insurance from the Marketplace