What should I bring to my tax appointment?

Last year's taxes, or the last year that you filed taxes, only if you are new to our office.

Social Security numbers for you and your children. We'll need the full name and social security number of each person on your tax return. This includes spouses, children, new babies, and relatives you can claim as dependents. These can be found on previous tax returns.

W-2's and 1099's from every company you worked for.

1099's for other sources of income such as interest from savings accounts, retirement/ pension distributions, gaming earnings from casinos and racetracks.

Stocks, bonds, mutual funds Your broker will send you a 1099B for the sale of securities. In addition, we will weed your basis and date of purchase of each stock and bond sold.

Social Security Statements

Gaming earnings/losses from race tracks or casinos Losses can only be taken against winnings.

Escrow Closing Papers, if you have recently purchased or refinanced a house. The final closing document (HUD Statement) may have some high dollar deductions for your taxes.

Tuition/ Student Loan Interest

Child Care Expenses

1099T Tuition Expense

Mortgage Interest

Property tax

Charitable contributions to church or other non-profit organizations

Interest paid for student loans

Tax preparation fee If we've done your taxes, we have it!

Personal property taxes paid (This may include payment for cars, trucks, boats, motorcycles, motor homes and RVs). In many states, this is collected by the DMV and paid when you renew your car registration.

Business owners

Bring a list of all income and expenses, your profit and loss statement and a list of capital expenditures.