

What should I bring to have my taxes prepared?

Wage statements (Form W-2)	Final pay stub from all employers
Pension or retirement income statements (Form 1099-R)	Proof of health insurance for the entire 12 months (Form 1095-A, Form 1095-B, or Form 1095-C)
Dependents' legal name, Social Security numbers, and dates of birth	Education expenses (Form 1098T), and statement of account from school and receipts for books and supplies
Interest and dividend income statements (Form 1099-INT and Form 1099-DIV)	Child care expenses and provider information
Information on the sales of stocks and/or bonds (Form 1099-B)	Self-employed business income and expenses
Lottery and/or gambling winnings and losses (Form W2-G)	State refund amount from previous year (Form 1099-G)
Social Security statements (Form 1099-SSA)	Unemployment income statements (Form 1099-G)
Income and expenses from rentals	Record of purchase and/or sale of real estate (HUD settlement statement)
Medical and dental expenses	Real estate and personal property taxes (vehicle taxes)
Estimated taxes or foreign taxes paid, include amounts and dates	Cash and non-cash charitable donation receipts
Health Savings Account distributions (Form 1099-SA)	Purchase of energy efficient windows & doors and certain high efficiency HVAC for principle residence and business
Health Savings Account contributions	Unreimbursed employment-related expenses (must be required by employer)
Mortgage or home equity loan interest paid (Form 1098)	Any other items that you think may be necessary for your taxes

Checklist of Itemized Deductions

Use the partial list of itemized deductions below as a checklist to help determine whether you may benefit from itemizing.

- ✓ Doctor and dentist fees
 - ✓ Prescription medicines
 - ✓ Insulin
 - ✓ Acupuncture
- ✓ Air conditioner necessary for allergies or respiratory ailments
 - ✓ Nursing fees
 - ✓ Hospital fees
- ✓ Contacts, including supplies (saline and enzyme cleaner)
 - ✓ Chiropractic services
- ✓ Medical, dental and long-term care insurance
 - ✓ Hearing aids
 - ✓ Dentures
- ✓ Guide dog for physically disabled persons
- ✓ Cosmetic surgery for deformity relating to a congenital abnormality, accident or disease
- ✓ Special equipment installed in home to provide a medical benefit
- ✓ Birth control prescribed by a doctor
 - ✓ State income taxes
 - ✓ Real estate taxes
 - ✓ Personal property taxes
 - ✓ Home mortgage interest
- ✓ Points paid on purchase of residence
 - ✓ Points paid on refinancing
 - ✓ Investment interest
- ✓ Charitable contributions
 - ✓ Casualty losses
 - ✓ Theft losses
- ✓ Tax return preparation fees
- ✓ Safe deposit box used to store investments
- ✓ Work clothes not suitable for normal wear
- ✓ Expenses relating to tax planning
- ✓ Expenses relating to investments
- ✓ Professional dues and union dues
- ✓ Certain unreimbursed employee expenses
- ✓ Subscriptions to professional magazines
- ✓ Continuing professional education
 - ✓ Occupational licensing fees
- ✓ Travel expenses relating to managing investments
 - ✓ IRA administration fees
 - ✓ Job-hunting costs
- ✓ Medical exams required by employer
 - ✓ Gambling losses to extent of gambling winnings
 - ✓ Estate taxes
- ✓ Fees to collect interest or dividends
- ✓ Legal fees for collecting taxable income or keeping a job
 - ✓ Trust administration fees
- ✓ Impairment-related work expenses

