

Checklist

What should I bring to the tax site?

- Original Social Security Number or ITIN for yourself, spouse, and dependents.
- Government issued photo identification for yourself and, if married, for your spouse.
- Last year's tax return (if available).
- Earned Income Documents-
Form W-2, Form 1099, tip income, unemployment compensations, Social Security Benefits, business income, alimony, IRA distributions, pensions and annuities, gambling winnings, and any other income information.
- Interest/dividend paid to you by financial institutions. This is usually reported on Forms 1099-INT and 1099-DIV.
- Receipts of childcare expenses with SSN/EIN of childcare provider.
- Tuition/Education Expenses-Usually reported on Form 1098-T. Textbook expenses are not permitted.
- Student interest payments.
- *Mortgage interest and proof of property tax payments(if you own a home).
- *Medical expense receipts.
- *Gambling losses only if you are reporting gambling winnings.
- *Unreimbursed employee expenses.
- Routing and account number if you want your refund to be directly deposited into your account.

You can print this list and use it to help you gather all the proper documents needed to prepare your tax return.

*Included on tax return only when you qualify to itemize deductions on Schedule A. For more information please ask your tax preparer.