**WHAT DO I NEED TO BRING TO MY TAX APPOINTMENT?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Personal Information** | |  | **Itemizing Deductions** | |
| **🖵** | Your SSN |  | **🖵** | Forms 1098 or other mortgage statements |
| **🖵** | Your spouse’s full name & SSN |  | **🖵** | Real estate & personal property tax records |
| **🖵** | Amount of any alimony paid & ex-spouse’s SSN |  | **🖵** | Employment-related expenses (dues, publications, tools, uniform cost & cleaning, travel) |
| **🖵** | Add your last 3 yrs tax returns. (If available) |  | **🖵** | Invoice showing amount of vehicle sales tax paid |
|  |  |  | **🖵** | HUD statement showing closing date of home purchase |
| **Other people who may belong on your return** | |  | **🖵** | Expenses related to your investments |
| **🖵** | Dates of birth & SSN |  | **🖵** | Records of non-cash charitable donations |
| **🖵** | Childcare records (incl. the provider’s ID #) if applicable |  | **🖵** | Amounts paid for healthcare insurance & to doctors, dentists, hospitals |
| **🖵** | Apprx. Income of other adults in your home (not spouse, if you’re filing jointly |  | **🖵** | Amounts of miles driven for charitable or medical purposes |
| **🖵** | Form 8332, copies of your divorce decree, or other documents showing that your ex-spouse is releasing their right to claim a child to you |  | **🖵** | Amount of state/local income tax paid (other than wage withholding), or amount of state & local sales tax paid |
|  |  |  | **🖵** | Amount paid for preparation of your 2010 tax return |
| **Other Income** | |  | **🖵** | Cash amounts donated to houses of worship, schools, other charitable organizations |
| **🖵** | Unemployment, state tax refund (1099-G) |  | **🖵** | Job-hunting expenses |
| **🖵** | Gambling Income (W-2G or records showing income, as well as expense records) |  |  |  |
| **🖵** | Hobby Income & expenses |  | **Employee Information** | |
| **🖵** | Jury duty records |  | **🖵** | Forms W-2 |
| **🖵** | Health care reimbursements (1099-SA or 1099-LTC) |  |  |  |
| **🖵** | Prizes & awards |  | **Rental Income** | |
| **🖵** | Amount of any alimony received & ex-spouse’s name |  | **🖵** | Rental asset information (cost, date places in service, etc) for depreciation |
| **🖵** | Other 1099 |  | **🖵** | Records of income & expenses |
|  |  |  |  |  |
| **Education Payments** | |  | **Retirement Income** | |
| **🖵** | Scholarships & fellowships |  | **🖵** | Pension/IRA/annuity income (1099-R) |
| **🖵** | Forms 1098-T & 1098-E, if you received them |  | **🖵** | Social Security/RRB income (1099-SSA, RRB-1099) |
| **🖵** | Bills from the educational institution or anything else that itemizes what you paid or received loans for versus what was covered by scholarship or other financial aid |  |  |  |
|  |  |  | **Self-Employment Information** | |
| **Savings & investments** | |  | **🖵** | Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s |
| **🖵** | Interest, dividend income (1099-INT, 1099-OID, 1099-DIV) |  | **🖵** | Records of all expenses – check registers or credit cards statements, & receipts |
| **🖵** | Income from sales of stock or other property (1099-B, 1099-S) |  | **🖵** | Business-use asset information (cost, date placed in service, etc) for depreciation |
| **🖵** | Dates of acquisition & records of your cost or other basis in property you sold |  | **🖵** | Office in home information, if applicable |
|  |  |  |  |  |
| **Vehicle Information** | |  | **If you were affected by a federally declared disaster** | |
| **🖵** | Total business miles driven for the year (other than commuting) |  | **🖵** | City/county you lived/worked/had property in |
| **🖵** | Amount of parking & tolls paid |  | **🖵** | Records to support property losses ( appraisal, clean-up costs, etc.) |
| **🖵** | If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc. |  | **🖵** | Records of rebuilding/repair costs |
| **🖵** | Total miles driven for the year (or beginning/ending odometer readings) |  | **🖵** | Insurance reimbursements/claims to be paid |
|  |  |  | **🖵** | Check FEMA to see if my county qualifies for individual assistance |
|  | **IRA Information** |  | **🖵** | FEMA assistance information |
| **🖵** | Traditional IRA basis |  |  |  |
| **🖵** | Value of IRA’s on Dec 31, 2016 |  |  |  |
|  |  |  |  |  |

**Organizing Your Home Records**

Because paper, such as receipts, fades with time and takes up space, consider scanning and storing your documents on a flash drive, an external hard drive, or a cloud-based remote server. Even better, save your documents to at least two of these places.

Digital copies are OK with the IRS as long as they’re identical to the originals and contain all the accurate information that was in the original receipts. You must be able to produce a hard copy if the IRS asks for one.

**Tip:** Tax season and year’s end are good times to purge files and toss what you no longer need; that’s often when the spirit of organization moves us. When you do finally toss out your home-related paperwork, use a shredder. Throwing away intact documents with personal financial information puts you at risk for identity theft.