**What to bring to your appointment**

**Personal Information**

* Your social security number and date of birth
* Your spouse's full name, social security number and date of birth

**Other people who may belong on your return**

* Dates of birth and social security numbers
* Childcare records (including the provider's ID number and address) if applicable
* 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

**Education Payments**

* 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
* Forms 1098-T and 1098-E, if you received them
* Scholarships and fellowships

**Employee Information**

* Forms W-2
* Forms 1099

**Self-Employment Information**

* Forms 1099-MISC, 1099-NEC, Schedules K-1, income records to verify amounts not reported on 1099s
* Dollar amount totals and records for all categories of expenses related to the business
* Business-use asset information (cost, date placed in service, etc.) for depreciation
* Office in home information, **if applicable** Vehicle Information & mileage log
* Total miles driven for the year (or beginning/ending odometer readings)
* Total business miles driven for the year (other than commuting)
* Amount of parking and tolls paid
* If you qualify to claim actual expenses bring totals for gas receipts, oil, car washes, licenses, personal property tax, insurance, lease or interest expense, etc.

**Rental Income**

* Records of income and expenses broken down into categories
* Rental asset information (cost, date placed in service, etc.) for depreciation

**Retirement Income**

* Pension/IRA/annuity income (1099-R)
* Social security/RRB income (1099-SSA, RRB-1099)

**Savings and Investments**

* Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
* Income from sales of stock or other property (1099-B, 1099-S)
* Dates of acquisition and records of your cost or other basis in property you sold

**Other Income**

* Unemployment, state tax refund (1099-G)
* Gambling income (W-2G or records showing income, as well as expense records) be sure to bring records of gambling losses as well
* Amount of any alimony received and ex-spouse's name, social security number and address if part of a divorce settled prior to 12/31/2018
* Health care reimbursements (1099-SA or 1099-LTC)
* Jury duty records
* Hobby income and expenses
* Prizes and awards
* Other 1099s

**Itemizing Deductions**

* Forms 1098 or other mortgage statements
* Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
* Real estate and personal property tax records
* Invoice showing amount of sales tax paid on a vehicle purchase or any other big ticket items
* HUD statement (settlement statement) showing closing date of home purchase and or sale
* Receipts for cash amounts donated to houses of worship, schools, and other charitable organizations, any donation over $25 must have a receipt
* Records of non-cash charitable donations, including receipt, list of items donated and their fair market value
* Amounts paid for healthcare insurance and to doctors, dentists, hospitals
* Amounts of miles driven for charitable or medical purposes

**IRA Information**

* Amount contributed for the current tax year (and the following, if applicable)
* Traditional IRA basis
* Value of IRAs at year end

**If you were affected by a federally declared disaster**

* City/county you lived/worked/had property in
* Records to support property losses (appraisal, clean-up costs, etc.)
* • Records of rebuilding/repair costs
* Insurance reimbursements/claims to be paid
* FEMA assistance information