

## Items to Bring to Your Tax Appointment

We cannot prepare your tax return if you do not have the following:

1. Social Security verification for yourself and any person who will be claimed on your return. This can be any one of the following:

- \* Social Security Card
- \* Social Security Benefits Statement (SSA-1099) that includes the person's name and SSN
- \* ITIN Card or Letter
- \* Medicare (not Medicaid) card if a letter A follows the Social Security Number on the card

2. Photo ID for yourself (and your spouse if you plan to file a joint return). Please note that a photo ID is in addition to, not in place of, Social Security verification listed above.

3. Any tax documents or records you can provide to verify the information on your return. Not all will apply to you, but please bring all that do:

- \* **New:** If you purchased health insurance through the Healthcare Marketplace, bring forms 1095A.
- \* All forms W-2 and 1099 showing wages you earned
- \* Interest and dividend statements
- \* Sales of stocks, bonds or a home
- \* Records of business income or expenses if you are self-employed including cash income
- \* Records of tips not reported on tax forms
- \* Unemployment compensation
- \* Social Security benefits statements
- \* Distributions from retirement accounts (pensions, annuities and IRAs)
- \* Tax forms showing canceled debt on a mortgage or credit card
- \* Alimony paid or received
- \* Educational Expenses for a college or trade school student
- \* Interest paid on student loans
- \* Educator expenses you incurred as a K-12 teacher
- \* Gifts to charity (Please include separate totals for cash and noncash contributions; in this program, noncash contributions are limited to a \$500 maximum.)
- \* Unreimbursed medical expenses including premiums, copays, medical bills, and prescriptions not paid by insurance.
- \* Child or dependent care expenses such as daycare or afterschool care
- \* Mortgage interest and property taxes you paid
- \* Ad Valorem taxes paid on your vehicle
- \* Gambling winnings, prizes, or other winnings

4. If you have a copy of last year's tax return, please bring it with you. It may contain the answers to some questions we may have about this year's return.

5. For married taxpayers, filing a joint return with your spouse will usually give you a better result than filing separate returns. Whichever way you choose to file, there are some things to know:

- \* If you plan to file jointly, both you and your spouse must be present to review and sign the return.
- \* If you are filing separately from your spouse, please bring your spouse's social security number, as it must be included on the return. It would also be helpful to know whether your spouse is itemizing deductions or taking the standard deduction.

6. If you want to receive your refund by direct deposit or pay your balance due with direct debit, please bring a blank check showing your account and routing numbers.

If you cannot keep your appointment, if you decide to file with another preparer, or if you need to cancel or reschedule for any reason, please call us as soon as possible at 251-219-0606. We look forward to serving you at one of our tax sites.