

What to bring - Tax Season 2012

What you need to bring for personal returns:

- W2's (last pay stub does not qualify as a W2)
- 1099R – Pension/ Annuity/ IRA Statements
- 1098 - Mortgage Statements
- Donations, Medical Expenses all Gambling Statements (Winnings & Losses)
- Real Estate Taxes Paid
- 1099INT/DIV- Interest Earned and/or Dividends
- 1099B Stocks bought & sold (basis needed)
- Child Care Expenses including name, address and SS#/EIN# for provider
- Education Expenses including 1098-T from college
- Voided check for clients wishing to use Direct Deposit for their refunds.
- Any mailings marked with **IMPORTANT TAX DOCUMENTS**
- Closing statement **MUST** be provided for all real estate transactions including purchases and sales of property and 1099S showing transaction.
- Any **1099SA** forms from your HSA account

What you need to bring for business returns:

- All income statements
- Profit and loss statements
- Business Expenses
- Vehicle expenses and mileage
- Major Asset purchases including date purchased and cost
- Voided check for clients wishing to use Direct Deposit for their refunds.

What you need to bring for rental income returns:

- All monies received from rental properties divided by properties
- Mortgage interest statements for properties
- Real Estate taxes for properties
- Expenses for properties by property
- Major Asset purchases or major repairs/ maintenance

Note: If we did not prepare your 2011 tax return, please bring a copy with you to your appointment.