

What to Bring to Your Appointment

- Social Security card(s)
- Driver's License(s) / State Issued ID(s)
- Employment Authorization Card*
- W-2s
- Last year's Federal and State tax return (for new clients)
- Self-employment business income and expenses /1099-NEC*/1099-MISC*/1099-K*
- Pension, retirement income/1099-R*
- Unemployment income/1099-G*
- Canceled Debt Amount/1099-C*
- Social Security income/SSA-1099*
- IRA contributions*
- Statements on the sales of stocks /1099-B*
- Interest and dividend income/1099-INT/1099-DIV*
- Lottery or gambling winnings/losses*
- Form 1095-A (Health Insurance Marketplace Statement)**
- Record of purchase or sale of residence*
- Medical and dental expenses*
- Real estate and personal property taxes*
- Estimated taxes or foreign taxes paid*
- Cash and non-cash charitable donations*
- Mortgage or home equity loan interest paid/1098*
- Tuition and Education Fees/1098-T*
- Student loan interest/1098-E*
- Casualty and theft losses related to a qualified disaster
- Child care expenses and the provider's name, address, SSN or EIN the expenses were paid to
- Receipt(s) for qualified energy efficient home improvements*
- Foreign income, foreign bank account, financial interest in or signature or other authority over foreign financial account (location, name of bank, account number, peak value of account during the year, the aggregate value of the financial account)

* If Applicable

** If purchased health insurance through the Federal or a State Marketplace.