

Things you need to bring to a tax appointment

- Picture ID
- Social security cards for everyone on the tax return
- All income documents
 - W2 w2G gambling winnings
 - 1099s Retirement/nonemployee/other income
 - Social Security 1099's
 - Interest received
 - Investment broker statements
 - Misc income
 - Tips not reported not reported on your W2
 - Prizes and awards
 - Commissions not reported on W2
 - Unemployment 1099
- Health Insurance cards
- 1095 A, 1095 B or 1095C Health Insurance document
- Documentation of all deductions
 - Medical expenses
 - Out of pocket health, dental, eye insurance
 - Long term care insurance
 - Mileage to medical appointments/drugstore/hospitals
 - Travel to speciality hospitals ie MD Anderson
 - Doctors/Dentist/eye exam/
 - Clinics/hospital
 - Acupuncture/chiropractor
 - Glasses /dentures/ hearing aids & batteries
 - Nursing expense
 - Rental or purchase of medical equipment
 - Handicap accessibility improvement to your home
 - Lab test
 - Taxes paid
 - Real Estate
 - Personal Property cars/motorcycles/boats/trailers/planes/trains
 - Motor Homes
 - Sales Tax on large purchases cars/appliances/furniture
 - Second home
 - Mortgage Interest Statement
 - Contribution receipts
 - Cash
 - Noncash

- Receipts from the charity with a list of what was given and the fmv
- Union dues
- Work expenses not paid by employer
 - Trade journals
 - Uniforms
 - Second job mileage
 - Telephone/internet if required for employment
 - Investment expenses
 - Alimony/Maintenance paid
 - Who to and their social security number
 - Travel away from home
 - Receipts for lodging and meals

Children/dependents

- Earned Income Tax Credit
 - Must have Earned income
 - Retirement/investment/social security/alimony./ child support do not count as earned income.
 - 4 tests that the dependent must meet to qualify for the credit
 - Relationship
 - Must be son daughter,etc
 - Age
 - Child must be under the age of 19 or full time student under 26,or be totally and permanently disabled regardless of age
 - Residency
 - Must live with taxpayer for more than half the year
 - Joint return
 - The child cannot file a joint return for the year.
 - Proof needed for credit one of the following
 - School records or statement
 - Landlord or property management statement
 - Health care provider records
 - Child care provider records
 - Social services records or statement
 - Indian Tribal statement
 - Statement from place of worship
 - Disability Proof
 - Doctor Statement
 - Social Services agency or program statement

Misc Questions

Were you eligible to be claimed as a dependent?

Did you get any notices from IRS or State of changes to your prior years returns?

Did you make any gifts of over 14,000 to any individual?

Did you have any worthless stocks?

Did you work out of country?