

What Do I Need to Bring to My Tax Appointment?

Personal Information

- Your social security number
- Your spouse's full name and social security number
- Amount of any alimony paid and ex-spouse's social security number
- Add Your 2010, 2009, and/or 2008 tax return(s). Your Tax Professional can check them for accuracy

Other people who may belong on your return

- Dates of birth and social security numbers
- Childcare records (including the provider's ID number) if applicable
- Approximate income of other adults in your home (not spouse, if you're filing jointly)
- 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

Other Income

- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Other 1099

Vehicle Information

- 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 want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

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

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
- Check FEMA site to see if my county qualifies for individual assistance

Retirement Income

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

Employee Information

- Forms W-2

IRA Information

- Amount contributed for 2011 (and 2012, if applicable)
- Traditional IRA basis
- Value of IRAs on Dec. 31, 2011

Rental Income

- Records of income and expenses
- Rental asset information (cost, date placed in service, etc.) for depreciation

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

Self-Employment Information

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s.
- Records of all expenses — check registers or credit card statements, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable

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 vehicle sales tax paid
- HUD statement showing closing date of home purchase
- Cash amounts donated to houses of worship, schools, other charitable organizations
- Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- Amounts of miles driven for charitable or medical purposes
- Expenses related to your investments
- Amount paid for preparation of your 2010 tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses