



Gather the Following Documents and Information and Bring With You to Make Sure Your Tax Return is Prepared Correctly

- Copy of last year's tax return (*if you are a new client*)
- Social Security cards, for all persons you may list on the return
- Birth dates for all persons you may list on return
- All income statements:
 - W-2 forms
 - 1099 forms
 - Social Security statements
 - Other statements, such as pensions, stocks, interest and any documents showing taxes withheld
- Total of alimony received or paid (*including recipient's social security number if you paid alimony*)
- All records of expenses, such as tuition, mortgage interest, real estate taxes, charitable contributions
- Dependent child care information: name and address of paid caretakers and either their Social Security number or other tax identification number
- If you purchased coverage through the Health Insurance Marketplace, Form 1095-A, Health Insurance Marketplace Statement
- Any other documents, statements or information related to federal income taxes or FIT withheld
- If you own or run a business or farm, collect records of all your income and expenses (*download the Sole Proprietorship Tax Organizer to help organize your information*)
- Bank routing numbers and account numbers to direct deposit any refund (*a check or a deposit slip with this information printed on the bottom works well*)