



What to Bring to Your Appointment

- ☐ Social Security card(s)
 - ☐ Driver's License(s) / State Issued ID(s)
 - ☐ Dependents' Social Security numbers and dates of birth*
 - ☐ Wage statements
 - ☐ W-2s
 - ☐ Last year's Federal and State tax return
 - ☐ Self-employment business income and expenses/1099-MISC*/1099K
 - ☐ Commissions received/paid*
 - ☐ 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 or bonds/1099-B*
 - ☐ Interest and dividend income/1099-INT/1099-DIV*
 - ☐ Lottery or gambling winnings/losses*
 - ☐ State refund amount/1099-G*
 - ☐ Income and expenses from rentals*
 - ☐ Alimony paid or received*
 - ☐ Record of purchase or sale of residence*
 - ☐ Medical and dental expenses*
 - ☐ Real estate and personal property taxes*
 - ☐ State or local taxes paid
 - ☐ Sales tax paid**
 - ☐ Estimated taxes or foreign taxes paid*
 - ☐ Cash and non-cash charitable donations*
 - ☐ Mortgage or home equity loan interest paid/1098*
 - ☐ Unreimbursed employment-related expenses*
 - ☐ Job-related educational expenses*
 - ☐ Educator expenses**
 - ☐ Tuition and Education Fees/1098-T**
 - ☐ Student loan interest/1098-E*
 - ☐ Moving expenses*
 - ☐ Casualty or theft losses*
 - ☐ Child care expenses and provider information*
 - ☐ Receipt(s) for qualified energy efficient home improvements**
 - ☐ Form 1095-A (Health Insurance Marketplace Statement)***
 - ☐ Form 1095-B/1095-C - Health Coverage Statements from Insurer/Employer
- * If Applicable
- ** Provision has expired. May be extended by Congress. Bring just in case.
- *** If purchased health insurance through the Federal or a State Marketplace.