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WHAT TO BRING WITH YOU

Employment & Income

- W-2 forms for the year
- Unemployment Compensation (1099-G)
- Miscellaneous Income including rent (1099-MISC)
- Retirement Income (1099-R)
- Social Security (1099-SSA)
- State & Local Income Tax Refunds (1099-G)
- Child Support Received
- State Assistance Received (FIA) (DHS)
- VA Benefits

Homeowner & Renter

- Mortgage Interest (1098)
- Property Tax Statements**
(Winter '09, Winter '10 and Summer '10) Bring all 3
- Rent Paid During Tax Year (Landlords name and address)
- Heating Cost of Home for the Year
- Sale of Your Home or Other Real Estate (1099-S)
- Second Mortgage/Line of Credit Interest Paid
- Energy Improvements to Your Residence such as: windows, insulation, furnace, water heater, refrigerator, washer, dishwasher

Financial Assets

- Interest Income Statement (1099-INT)
- Dividend Income Statements (1099-DIV)
- Proceeds from Broker Transactions (1099-B)

Expenses

- Gifts to Charity (must have receipts)
- Unreimbursed Expenses Related to Your Job
(travel, uniforms, union dues, tools)
- Child Care Expenses (Bring Day Care's ID number and address)
- Unreimbursed Expenses Related to Volunteer Work
- Student Loan Interest Paid (1098-E)

Self-Employed

- Business Income (Form 1099-MISC) and/or own records
- Business-Related Expenses: Own records Showing Totals of Each Category of Deduction
- Farm-Related Expenses: Own records Showing Totals of Each Category of Deduction
- Rental-Related Expenses: Own records Showing Totals of Each Category of Deduction
- Business Mileage
- Automobile Interest paid if for business
- Schedule K-1's

Miscellaneous Tax Documents

- Estimates Paid for Current Year
- IRA Contributions
- Tuition paid at University or College for Self or Child (1098-T)