Items Clients NEED to bring (Personal)

* W2’s
* 1099’s
* Government Picture ID (New 2017)
* Bank Interest Statements
* Medical Deductions
	+ Health Insurance Premiums if not through employer
	+ Long Term Care Premiums
	+ Medical Miles Driven
	+ Out of Pocket Medical Expenses
		- Medical
		- Dentist
		- RX
		- Glasses
* Car Tabs
* Mortgage Interest Statements
	+ Closing Statements if you Bought, Sold or Refinanced a home
* Property Tax Statements – all Real Estate
* Cash Donations
* Other than Cash Donation ex. Goodwill
* Un-reimbursed Work Expenses
	+ Union Dues
	+ Continuing Education
	+ Miles driven to 2nd job
	+ Uniform and Maintenance
	+ Use of cell phone and percentage used for work vs. personal
* Children’s Social Security Numbers
* Daycare Providers Name and Social Security Number or Tax ID
* Copy of Last Years Taxes if not prepared here
* Statements from Stock Transactions
	+ Cost Basis –(what you paid for the stock)
* Any other forms of Income (gambling, self-employment, etc.)
* Student Loan Interest
* 1098T – for tuition
* 1098E – for Student Loan Interest