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