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What to bring to your appointment?

- ID (ex.: driver's license, identification card, passport, etc.)
- Social Security Number for you and all dependents
- Prior year tax return (if prepared in a different office)
- W-2 forms (wages, gambling winnings, etc.)
- 1099 forms (interest, dividends, etc.)
- Brokerage statement (details of your stock sale and purchase)
- Schedule K-1's (from partnerships, s-corporations, etc.)
- Business income and expenses (self-employed)
- IRA/Pension distribution and contribution
- Real Estate taxes paid including the property PIN
- Home mortgage interest (Form 1098-INT)
- Charitable contributions
- Tuition forms or proof of payment (1089-T)

New for the 2012 Tax Year

- Proof of residency for your dependent child (medical or school record, landlord statement, etc.)