



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.