



NAME _____

PHONE _____

EMAIL _____

INDIVIDUAL TAX RETURNS - WHAT TO BRING

- W-2 forms
- 1099 forms
- 1095-A Health Care Coverage statement
- 1099-C Cancellation of Debt form
- Sale of personal residence - HUD1
- 1099-B and year end stock account statements
- Other Income - Rental, Prizes, Gambling, K-1, Alimony, IRA, Retirement, Social Security, Unemployment
- Medical & dental expenses, including insurance
- Real estate taxes paid
- Mortgage interest paid
- Work related expenses - supplies, mileage, travel, entertainment, uniform
- Charitable contributions
- Tuition and fees for higher education
- Student loan interest
- Gambling losses
- Investment expenses
- Dependent care expenses
- IRA contributions
- Last 3 years tax returns