



Bring all of the following that apply to you:

- *Copies of your last year's federal and state tax returns
- * W-2's for wages (bring all received by all tax payers on the return)
- *Social Security cards for you, your spouse and dependents
- *Social Security numbers along with names and addresses for all child care providers
- *Social Security numbers of all alimony recipients
- *Forms 1099 for interest, dividends and investment income distributions
- *Forms 1099 for sale of stock or bonds and information on original purchase dates and cost basis
- *Forms 1099-MISC for all other income
- *Amount of tax-exempt interest and/or dividends received
- *Amounts paid for tuition and fees or as interest on a student loan
- *Amounts/receipts for itemized deductions (see list on back for further detail)
- *W-2G's for gambling winnings and amounts for gambling losses
- *For K-12 school teachers, counselors, principals—amount paid for school supplies purchased
- *If you will have a tax refund & want a direct deposit of the refund to your bank account, bring your checkbook. (The routing and account numbers printed on the check are needed to arrange for the deposit.)

Medical & dental expenses

- Medical & hospital insurance premiums
- Long-term contracts
- Prescription medications& insulin
- Transportation associated with medical care, including vehicle miles, bus fares, parking fees and bridge tolls
- Unreimbursed charges from doctors, dentists, and other medical specialists
- Hospital service fees (lab work, therapy, surgery, etc.)
- Unreimbursed costs of meals and lodging provided by hospital during treatment
- Cost and care of guide dogs or other animals aiding the blind, deaf or disabled
- Oxygen equipment and oxygen
- Eye surgery to promote correct function of eye
- Special prescribed/required items—glasses, contact lenses, hearing aids, false teeth, wheelchair, crutches, artificial limbs
- Stop-smoking programs
- Treatment at a drug or alcohol center
- Part of life-care fee paid to a retirement home designated for medical care
- Wages for nursing services
- Capital expense for equipment or home improvements needed for medical care

Expenses that may be deductible

Interest

- Home mortgage interest
- Student loan interest

Taxes

- State & local income taxes
- Real estate taxes
- Property taxes
- Personal property taxes

Contributions

- Money or property given to a religious organization, nonprofit organization (such as Salvation Army, Good Will, United Way, Boy/Girl Scouts, etc), nonprofit schools & hospitals, public park and recreation facilities, veterans organizations
- Out of pocket expenses when you serve as a volunteer for a qualified organization

Miscellaneous Expenses

- Union dues and expenses
- Work clothes and uniforms that you must wear as a requirement of the job and that can't be worn everyday
- Tax preparation fees
- Certain legal expenses, relating to producing or collecting income or taxes
- Certain expenses, including resume preparation and travel, incurred in looking for a new job in your present occupation