WHAT TO BRING FOR YOUR TAX INTERVIEW

□ W-2

□ WORK RELATED EXPENSES

□ DRIVER'S LICENSE

□ SS CARD

□ LAST YEAR'S TAX RETURN

□ DEPENDENTS & SPOUSES SS CARDS

□ CHILD CARE EXPENSES

□ DEDUCTIBLE EXENSES

□ ALIMONY PAID / RECEIVED

□ CHARITABLE DONATIONS

□ INCOME FROM RENTALS

□ MONTHLY EXPENSES

□ PURCHASE OR SALE OF HOME

□ PURCHASE OF NEW VEHICLE

□ MAJOR / ENERGY EFFICIENT HOME IMPROVMENTS

□ 1099 MISC - MISCELLANEOUS EXPENSES (SCHEDULE C)

□ SELF EMPLOYMENT EXPENSES

□ 1098 E - STUDENT LOAN INTEREST

□ 1098 T - EDUCATION / TUITION

□ EDUCATIONAL EXPENSES

□ 1098 - MORTGAGE INTEREST STATEMENT

□ TAXES PAID (PROPERTY, MUD, SCHOOL, COUNTY)

□ 1099 R - PENSION / ANUITY INCOME

□ 1099 DIV - ORDINARY DIVIDENDS

□ 1099 INT - INTEREST

□ W-2 G - GAMBLING WINNINGS

□ 1095 A - HEALTHCARE MARKETPLACE (OBAMA CARE)

□ 1095 B - MILTARY / MEDICAID

□ 1095C - PRIVATE / WORK HEALTH INSURANCE

□ MEDICAL EXPENSES

□ 1099 A - ACQUISITION OF ABANDONMENT OF SECURED PROPERTY

□ 1099 B - CAPITAL GAINS / LOSSES

□ 1099 C - CANCELLATION OF DEBT

□ 1099 G - CERTAIN GOVERNMENT PAYMENTS (UNEMPLOYMENT)

□ 1099 K - PAYMENT CARD & 3RD PARTY NETWORK TRANSACTIONS

□ 1099 K1 - PROFIT SHARING

□ RRB 1099 - RAILROAD RETIREMENT BENEFITS

□ SSA 1099 - SOCIAL SECURITY BENEFITS STATEMENT

□ 1099 K1 - PROFIT SHARING