

BRING THE FOLLOWING:

- Picture ID
- Social Security Cards (or ITINs) and dates of birth for the taxpayer, spouse, children, and any other dependents you are claiming.
- Note: if you are married filing separately, you'll need your spouse's social security number and need to know whether they itemized on their return
- Dates of birth for all taxpayers and dependents
- W2 forms
- Bring your year-end pay stub
- 1099 forms
- Unemployment amounts paid and taxes withheld, statement online
- Last paystub or end of year pension statements
- Year-end retirement account summaries (ex. 5498s) (Balances in IRA accounts at year end)
- Any other tax forms you received (1098-Ts)
- ACA healthcare forms 1095-A, 1095-B, or 1095 C and insurance information with months of coverage for each person in the household
- Medical expenses- TOTALED. Don't forget eyeglasses or contact lens receipts or medical mileage
- Charitable Contributions TOTALED- separate cash contributions (cash, check, credit card) and non-cash contributions (ex: clothing & furniture). Church printout. Receipt for any contribution of \$250 or more
- Rent or mortgage interest statement
- All property tax information (green card, PTR 1, PTR 2, homestead rebate amount)
- Copy of 2015 income tax return
- Bank account and routing number