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Tax Interview Date & Time: _____

What to Bring to Your Tax Interview

Number/ Identification	✓	Description
		Social Security card(s)
		Driver's License(s)
		Dependent's Social Security cards and dates of birth
		Prior years Federal and State Tax Returns

Income

		W-2's - Wage Statements
		1099-INT - Interest Income
		1099-DIV - Dividend Income
		1099-MISC - Self Employed Business Income
		Commissions Received
		1099-R - Pension, Retirement Income
		SSA-1099 - Social Security Income
		1099-G - State Refund Amount
		1099-G - Unemployment Statement
		1099-B - Sales of Stocks/Bonds Statement
		1099-C - Canceled Debt Statement
		Lottery/Gambling Winnings
		Rental Income
		Alimony Received

Expenses/Credits

		IRA Contributions
		Self Employed Expenses
		1098 - Mortgage/Home Equity Loan Interest Paid
		Lottery/Gambling Losses
		Rental Expense
		Alimony Paid
		Medical/Dental Expenses
		Real Estate/Personal Property Taxes
		State/Local Taxes Paid
		Current Year Estimated Taxes Paid
		Foreign Taxes Paid
		Charitable Contributions Receipts
		Unreimbursed Employment Related Expenses
		Job-Related Educational Expenses
		Educator Expenses
		1098-T Tuition and Education Fees
		1098-E - Student Loan Interest
		Casualty/Theft Losses
		Child Care Expenses and Provider EIN/SS#/Contact Information

Other

		Record of Purchase and/or Sale of Residence
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