WHAT TO BRING TO YOUR INITIAL INTERVIEW - INDIVIDUALS

Thank you for choosing Tax & Financial Solutions to prepare your tax return this year. We are highly experienced and qualified tax professionals who know all the latest tax law changes. We will take the time and effort to analyze your specific tax circumstances to identify potential tax deductions and recommend tax saving strategies.

To ensure the preparation of your tax return goes smoothly, please bring the following items to your scheduled tax appointment. **NOTE: Not all items may apply to you. Please bring what you have.**

GENERAL

- **PREVIOUS YEAR FILED FEDERAL AND STATE TAX RETURNS** - If you are a **new** client, please bring physical copies of your last year filed federal and state tax returns.
- **VOIDED CHECK** – to set up direct deposit and wiring information for your refund(s)

INCOME

- **WAGES**- Forms W-2.
- **UNEMPLOYMENT COMPENSATION**- Forms 1099-G.
- **SOCIAL SECURITY BENEFITS**- Forms SSA-1099, and/or RRB-1099.
- **IRA, PENSIONS AND ANNUITIES**- Forms 1099-R.
- **ROYALTIES, PARTNERSHIPS, S CORPORATIONS, TRUSTS, ETC**. – Forms K1 and Forms- 1099-MISC .
- **INTEREST**- Forms 1099-INT.
- **DIVIDENDS**- Forms 1099-DIV.
- **STATE AND LOCAL INCOME TAX REFUNDS**- Forms 1099-G.
- **BUSINESS INCOME**-Summary of income and expense amount, by category (i.e. rent, taxes, etc.)
- **CAPITAL GAINS (LOSS**) - Forms 1099B, generally, from stocks and bonds. Need purchase date, cost/purchase price, sale date, sale price, if any commissions paid. This information is obtained from broker or historical records of client.
- **OTHER INCOME**- Forms W-2G, 1099-MISC, 1099-C.

DEDUCTIONS

- **DEPENDENTS**- Names, birth dates and social security cards.
- **DEPENDENT CARE** – Each provider's name, address, federal number or social security number and amount paid to each provider.

- **QUALIFIED TUITION AND RELATED EXPENSES**- Forms 1098-T. This form will come to you or your student in the mail, or your student may log on to his/her college website to print a copy.
- **STUDENT LOAN INTEREST**- Form 1098-E.
- **ITEMIZED DEDUCTIONS –** Information regarding auto excise tax, state and local sales taxes, tax preparation fees, custodial fees, financial planning fees, mortgage insurance premiums, casualty and theft losses, investment related subscriptions, safe deposit fees paid.
- **HEALTH INSURANCE & MEDICAL EXPENSE** – Form 1095**.** Any medical, dental, or pharmacy expenses. (We suggest you provide a summary statement easily obtained from your pharmacy.)
- **DONATIONS**- Any donations made to charities (Church, Salvation Army, Good Will) If you donated a car you need to provide the 1099 that states the value.
- **EMPLOYEE EXPENSES**- Unreimbursed amounts paid for employee expenses, such as Uniforms, Tools, Equipment, License Fees, Liability Insurance, Union dues.
- **HOME PURCHASE/SALE**- Closing/Settlement statement for properties/residences purchased/sold or refinanced in the current year.
- **MORTGAGE INTEREST DEDUCTION**- Form 1098, final settlement statement if purchased , sold, or refinanced in the current year.
- **REAL ESTATE TAX DEDUCTION**- Form 1098, receipts of taxes paid, final settlement statement if purchased, sold, or refinanced in the current year.
- **RENTAL REAL ESTATE -** Summary of rental income and expense amount, by category (i.e. taxes, interest, repairs, capital items [such as buildings. Land improvements, building improvements, need dates purchased, dates placed in service and costs/purchase price]).
- **GAMBLING WINNINGS** – Form W-2G.
- **MISCELLANEOUS INCOME** – cash earned from side jobs, barter exchanges of goods or services, awards, prizes, contest winnings.
- **CANCELLATION OF DEBT** – Form 1099-C. A debt includes any indebtedness whether you are personally liable or liable only to the extent of the property securing the debt. Cancellation of all or part of a debt that is secured by property may occur because of a foreclosure, a repossession, a voluntary return of the property to the lender, abandonment of the property, or a principal residence loan modification.
- **FEDERAL, STATE AND LOCAL INCOME TAXES PAID**-Form W-2, estimated payments to include dates paid and amounts.

NOTE: Your particular situation may require additional documents. Please be aware that if you have sold stocks or mutual funds, converted a Traditional IRA to a Roth IRA, lived abroad, or moved your household for employment reasons you may need to provide additional information. If information is not available this will delay the preparation for your return. If you have questions with respect to what to bring to your appointment, please call us at (503) 666-7909 and speak to a client service specialist at the front desk.