

## **What should you bring to your tax appointment?**

Because of identity theft (Not here!) We are requesting:

- Social Security Cards, for everyone one the tax return
- Picture ID

Most of you will not have most of the below list, this is to help you think of anything and everything you may need!

- W-2(s)
- Gambling Winning (W-2G)
- Interest Income (1099-Int)
- Dividend Income (1099-Div)
- Stock Sales
- Business Income and Expenses
- K-1(s)
- 1099's, IRA's, 401-k, Rollovers, Etc.
- Education (1098-T) & Detail/itemized bill if available
- Unemployment Income
- Cancellation of debt
- Misc. Income
- Any other Income
- Student Loan Interest
- Health Insurance Information
- HSA's
- Mortgage Interest Statement
- Property Taxes
- Child Care Expense
- MN K-12 School Expenses (Receipts)
- Residential Energy Improvements (Receipts)
- Vehicle Registrations (tabs)

- Medical expenses
  - Dental
  - Premiums
  - Chiropractor
  - Clinics, Hospitals, Prescriptions
  - Vision
  - Hearing
  - Miles for medical
  - Hotel/travel (meals NOT included)
- Charitable Contributions (Proof needed: Letters, Receipts, Cancelled Checks, etc.)
- Job Expenses (NOT reimbursed by employer)
  - Union Dues
  - Protective work clothes
  - Professional Associations & Dues
  - Safety Equipment
  - Tools
  - Licensing
  - Continued Education
  - Miles if Applicable
  - Travel
- Safe Deposit Box
- Tax Prep Fee
- Other
  - Gambling losses (need proof)