List of Items to Bring to Tax Appointment

Here is a basic checklist to help you start organizing for your 2014 tax return appointment. Please fill out the Intake/Interview Sheet (Form 13614-C) and bring with you to appointment. If you're fully prepared for your appointment, you'll save time and help ensure that you receive all the tax benefits, credits, and deductions allowable. If you have any questions, please contact us at 310-653-3815.

Personal Data

- Military ID card
- Verification of Social Security numbers for you, your spouse, and dependents. Acceptable documents include: Last year's tax return or SS cards
- If you are claiming children who did not live with you due to divorce, bring a copy of the Divorce Decree or signed 8332 – Release of Exemption

Employment & Income Data

- W-2 forms, including PCS Move W2
- 1099-R forms: Pensions, annuities, retirement plans, IRA distributions and/or rollovers
- 1099-INT: Interest-income statements
- 1099-DIV: Dividend-income statements
- 1099-B: Proceeds from broker transactions, stock sales. We will need Date of Purchase and Cost Basis, if not already included on 1099B. This can be found on a Statement of Realized Gains and Losses, or you may have to contact your Securities Advisor
- Alimony received
- W2-G forms: Gambling and lottery winnings
- 1099-MISC: Prizes and awards, jury duty pay, etc.
- 1099-G: State and local income tax refunds, Unemployment income
- 1099-SSA: Social Security Benefits
- K-1: Partnership or Estate/Trust Income

Taxes Paid

- Estimated tax payments: date and amount of each tax payment made for 2014
- State taxes paid in 2014
- Any notices you have received from IRS or State Taxing Agencies

Homeowner/Renter Data

- Form 1098: Mortgage interest
- 1099-S: Sale of residence
- 1099-A or 1099-C: Foreclosure or short sale
- Final Escrow Closing Statement (HUD-1) for sale, refinance or purchase of residence
- Property taxes paid
- Rent paid during tax year, landlord name, address and phone number

Deductible Items

- Unreimbursed Moving expenses
- 1098-E: Student loan interest paid
- 1098-T: Education expenses, including Tuition and Fees, and Books
- Classroom Expenses for qualified teachers
- Alimony paid: amount paid, name, and social security number of recipient
- IRA Contributions (Roth or Traditional)
- Vehicle license fees (VLF) from DMV renewal
- Letter/Receipt for cash charitable donations
- Record of non-cash contributions with Name and Address of Organization, Brief description of donation, Fair Market Value of items donated and dates donated
- Child-care expenses: Name, Address, Phone Number and Child-Care provider's tax ID or Social Security number
- Medical expense records

Other Items to Bring

- Last year's tax return and source documents
- Banking information for Direct Deposit of Refund or Direct Debit of Taxes owed
- Copy of Deployment Orders, if applicable