

List of Items to Bring to Tax Appointment

Here is a basic checklist to help you start organizing for your 2012 tax return 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 call our office 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
- Birthdates for everyone claimed on your tax return
- If you are claiming any 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, self-employment income
- 1099-G: State and local income tax refunds, Unemployment income
- 1099-SSA: Social Security Benefits
- 1099-C: Cancellation of Debt
- K-1: Partnership or Estate/Trust Income

Taxes Paid

- Estimated tax payments: date and amount of each tax payment made for 2012
- State taxes paid in 2012
- 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 property or 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 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