

RODNEY M. FOUNTAIN CPA, PA

What Should I Bring to a Tax Appointment?

In order to best serve you as your tax preparer, there are some documents that you will need to bring with you to your tax preparation appointment. Having these documents will allow us to either decrease your tax liability as much as possible and/or get you the largest refund possible. The documents that you will need to bring for an appointment to complete and file your taxes vary from person to person and can include but are not limited to the following:

Social Security Card(s)

Driver's License(s)

Dependents' Social Security Numbers & Dates of Birth

Last Year's Federal and State Tax Returns Wage Statements - Form W-2

Pension or Retirement Income - Form 1099-R

Interest and Dividend Income - Form 1099-INT/Form 1099-DIV

State Income Tax Refund Amount - Form 1099-G

Social Security Income - Form SSA-1099

Unemployment Income - Form 1099-G

Commissions Received/Paid

Information on Sales of Stocks or Bonds - Form 1099-B

Self-Employed Business/Farm Income & Expenses - Form 1099-MISC

Lottery or Gambling Winnings - Form W-2G

Lottery or Gambling Losses

Income and Expenses From Rentals

Income from Partnerships, S Corporations, Trusts, and Estates - Schedule K-1

IRA Contributions

Alimony Paid or Received

Child Care Expenses & Provider Information

Medical, Eye Care, and Dental Expenses

Cash and Noncash Charitable Donations

Record of Purchase or Sale of Residence

Mortgage or Home Equity Loan Interest Paid - Form 1098

Real Estate and Personal Property Taxes Paid

State or Local Sales Taxes Paid

Unreimbursed Employment-Related Expenses

Job-Related Educational Expenses

Tuition and Education Fees - Form 1098-T

Student Loan Interest - Form 1098-E

Casualty or Theft Losses

Estimated Taxes

Foreign Taxes Paid