

Items you will need for your Tax Appointment

- (Copy of your 2011 tax return
- (State issued photo ID

- (Social Security Numbers for you, your spouse, and any children in the household born before December 31, 2011
- (W-2 forms for all jobs worked in 2011
- (1099R, if money was received from 401K distributions in 2011
- (1099-G form, if unemployment insurance benefits were received at anytime in 2011
- 1 1099-INT, if bank interest was received in 2011

- (1098 form (statement received from mortgage company)
- (Real Estate taxes statement if not included on your mortgage statement
- (Copy of your current tax bill

- 1 W2- G, if gambling income was received in 2011
- 1 Charitable contributions statements
- (Children care provider statement, including tax identification number, address and total amount paid.
- 1 Student loan interest statement
- (Tuition payment statement
- (Void check (for direct deposit of funds)
- (**First time home buyer paperwork. Bring closing papers.**