

Items to Bring to Your Individual Tax Preparation Appointment

- W-2s from all jobs.
- Forms 1099 from all investments and bank accounts (be sure they are all accounted for).
- Property tax receipts.
- Form 1098 reporting home mortgage interest.
- If you started a new business, all of the information listed below (see checklist for businesses).
- Form K-1s from any estate(s), partnership(s), or S corporation(s) from which you've received an inheritance. Call and check if missing any, as these often do not arrive until March or April.
- Receipts for medical expenses.
- Records of gambling profits and losses. To offset reportable profits, you must have an accurate log of expenses and losses including amounts, dates, and locations.
- Itemized record of charitable gifts. A list of "12 shirts, 3 suits, and 2 jackets" as opposed to a "bag of clothes," will allow a true value for the items. Charitable gifts over \$500 must include a signed receipt from the charity.
- A copy of last year's tax return.
- A list of financial goals, if seeking counsel.