



## ITEMS TO BRING TO YOUR APPOINTMENT

(AS IT PERTAINS TO YOU)

| CHECKLIST ITEMS  | TAX FORMS           |
|--|---------------------|
| ◦ JOB WAGES / SELF-EMPLOYEED                             | W2's / 1099's       |
| ◦ MORTGAGE STATEMENT                                     | 1098                |
| ◦ TUITION STATEMENT (SCHOOL FORM)                        | 1098-T              |
| ◦ NON-EMPLOYEE COMPENSATION<br>(SELF-EMPLOYMENT INCOME)  | 1099-MISC           |
| ◦ IF A DEBT HAS BEEN SETTLED W/IN THE TAX YEAR           | 1099-C              |
| ◦ EARLY DISTRIBUTION- IRA/401K/<br>INSURANCE             | 1099-R              |
| ◦ UNEMPLOYMENT COMPENSATION                              | 1099-G              |
| ◦ GAMBLING WINNINGS                                      | W2-G                |
| ◦ SOCIAL SECURITY BENEFITS<br>(IF OTHER INCOME INCLUDED) | 1099-SSA            |
| ◦ INTEREST INCOME & DIVIDEND<br>INCOME                   | 1099-INT<br>1099-SA |
| ◦ HSA Health Savings Account                             | 1095                |
| ◦ HEALTH INSURANCE                                       | 1099-A              |
| ◦ INTEREST/DIVIDEND EARNED<br>(\$10.00 - \$600.00 MIN.)  | 1099-DIV            |
| ◦ ITEMIZING (SCHEDULES)                                  | ORGANIZERS          |

