

**Things to bring to your tax appointment:**

- **W-2s from all employers.**
- **W-2G for any gambling winnings.**
- **1099R for all pension and IRA Distributions.**
- **1099Int for all Bank Interest income.**
- **1099Div for all Stock Dividends.**
- **1099B for Stock Sales.**
- **1099NEC along with a simple profit/loss statement or other summary of income and expenses for any gig work or side hustle or other Self-Employment income. Also any mileage logs or other record of vehicle usage.**
- **1099Misc for any other income, such as prizes won, or Rental income received.**
- **1099G for Unemployment Compensation received.**
- **1099SSA for Social Security payments received.**
- **1098 for Mortgage Interest, and Property Taxes paid.**
- **1098T for Tuition that you paid, or your dependent's 1098T if they were in College.**
- **1095A from Mnsure, if you are getting your health insurance through them.**
- **Names, Birthdates, and Social Security numbers of new dependents on your return.**
- **How much you received from the Economic Impact Payments (stimulus payments) for both rounds of payments.**
- **The closing papers for any property that you purchased or sold during the year.**
- **A summary of your charitable contributions during 2020. Bring the acknowledgement letter for large donations. Also include your non-cash contributions, such as Goodwill.**
- **A summary of your medical and dental expenses, including health insurance if you paid for it out of pocket, and you think it may be significant.**
- **Your dependent children's tax forms.** We continue to have problems with Dependent Children filing their own returns and claiming themselves. This will result in issues filing your own return claiming them, so PLEASE do not let them file before you do. We file Dependent returns for only \$50. We charge much more to Amend those returns.
- **For new clients, a copy of your last 3 years returns will allow us to check those returns for accuracy and missed deductions and credits. Also, Social Security Cards for all adults and dependents on the return.**