

2016 Tax Clients Should Bring

All Taxpayers:

W2 Employer

Driver's License or Picture ID - Everyone

Social Security Cards - Taxpayer and dependents

Proof Dependent Care

Health Care - Marketplace Premium Form 1095A (if any) or any other healthcare premiums not work related.

1095-B and/or 1095-C (Healthcare from Job)

Previous Year's Returns

Schedule A - Itemized Deduction Taxpayers:

1098 Mortgage Interest Statement

House Taxes

Car Taxes

Medical Expenses

Charitable Contributions

Miscellaneous Deductions

Casualty or Theft Loss

Gambling Income and Expenses

Investment Income and Expenses

College Students or Dependent College Students

1098T - Tuition Statement

Book Receipts

Additional Income Documents If Applicable

1099 Miscellaneous - Independent/Contractor

1099 Div. - Dividends

1099R - Retirement

1099 Int. - Interest

1099G – Unemployment

