

Bring:

- Military ID
- Social Security cards or other proof of social security number for family
- Voided check for direct deposit information
- W-2s from each employer
- 1099-INT, 1099-DIV, 1099-B from banks, credit unions, stocks, bonds mutual funds
- Records for IRA contributions
- 1098-E for student loan interest paid
- 1098 for mortgage interest and PMI (Private Mortgage Insurance)
- Records for taxes paid: Real estate, personal property, sales tax on new car
- Records for Charitable contributions
- Records for moving expenses.
- Any other 1099 or 1098 forms you received
- Records for all other income you have received
- Copy of last year's return
- Copy of year end pay statement
- Have all receipts organized and totaled