

## CHECK LIST FOR YOUR TAX APPOINTMENT

### IMPORTANT INFORMATION

- Social Security numbers and birth dates for everyone on your tax return
- If TOBYTAX.COM didn't prepare your tax return last year, a copy of that previous year return and the amount that you paid to have it prepared or filed
- For direct deposit, your bank name, bank routing number and account number
- Proof of identification (Driver's License, Government-issued Photo I.D.)

### FORMS

- Wage and earning statement(s) Form W-2, W-2G, 1099-R, from all employers
- Schedule K-1s from any partnerships or investments
- Records of contributions to IRAs or other retirement plans
- Interest and dividend statements from banks (Forms 1099)
- Closing documents if you purchased a home
- Records for mortgage interest and property taxes

### INCOME/INVESTMENTS

- Income and expense records for any work you were paid for if not shown on a W-2 or 1099
- Records of other income such as rental, gambling, hobby, alimony or jury duty and any applicable expenses associated to such income
- Purchase date and total investment cost of any property or stocks that you sold
- Unemployment income if any
- Cancelled debt income if any

### DEDUCTIONS/EXPENSES

- Amounts donated to churches, schools or any charitable organizations
- Number of miles driven for medical, charitable or work-related reasons
- Total mileage driven during the year
- Cost of vehicle registrations
- Any expenses related to investments or legal fees
- Amounts paid for health care, insurance, prescriptions, hospitals, dentists and doctors
- Cost of higher education for you or any dependents
- Employment related expenses such as union dues, travel, publications, tools, uniforms and cleaning
- Job search expenses and/or moving expenses for a move over 50 miles
- Total amount paid for a day care provider and the day care provider's tax identifying number - the provider's Social Security Number or Employer Identification Number