



Source Accounting Solutions

What to bring to appointment:

Itemized Deductions:

Property Tax: _____	MED/DEN/VIS Premiums: _____
Mortgage Interest: _____	Med/Den/Vis Expenses: _____
Real Estate Tax: _____	Work Related Expenses: _____
Donations: _____	Union Dues: _____
Car Tag: _____	

Tax Documents

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| <ul style="list-style-type: none"> ○ 1099-MISC ○ Alimony Paid or Received* ○ Canceled Debt Amount (Form 1099-C)* ○ Casualty or Theft Losses* ○ Child Care Expenses and Provider Information* ○ Commissions Received or Paid* ○ Dependents' Social Security Numbers and Dates of Birth* ○ Educator Expenses**** ○ Estimated Taxes of Foreign Taxes Paid* ○ Exemption Certificate Number*** ○ Health Insurance "Marketplace" Statement (Form 1095-A) ○ Income and Expenses from Rentals * ○ Interest and Dividend Income (Form 1099-INT / Form 1099-DIV)* ○ IRA Contributions* ○ Last Year's Federal and State Tax Return (New Clients) ○ Lottery or Gambling Winnings/Losses (Form W-G)* | <ul style="list-style-type: none"> ○ Mortgage or Home Equity Loan Interest Paid (Form 1098)* ○ Moving Expenses* ○ Pension/Retirement Income (Form 1099-R)* ○ Record of Purchase or Sale of Residence* ○ Sales Tax Paid**** ○ Self-employment Business Income (Form 1099-K) ○ Social Security Income (Form SSA-1099)* ○ State Refund Amount (Form 1099-G)* ○ Statements on the Sales Of Stocks or Bonds (Form 1099-B)* ○ Student Loan Interest (Form 1098-E)* ○ Tuition and Education Fees (Form 1098-T)**** ○ Unemployment Income (Form 1099-G)* ○ Wage Statements ○ W-2s <p>*If Applicable
 **If you received health insurance from Marketplace
 *** If you received an exemption from needing health insurance from the Marketplace
 ****Provision has expired. May be extended by Congress. Bring just in case.</p> |
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