

**New Clients:**

Copies of Social Security cards (if available)

Birthdates of all filers and dependents and correct spellings of names

Previous 2 years tax returns

**Returning Clients:**

Current mailing address

New Dependent - Copy of Social Security card & birth date

W-2's for all employers for 2012

1099 - Misc - miscellaneous income

1099 - INTEREST forms or statements in lieu of Form 1099-Interest from banks, investments, etc.

1099 - DIVIDEND forms or statements in lieu of Form 1099-Dividend from investments

1099 - G - for any taxable State Refunds received in 2012 or applied to 2012 tax year

1099 - G - for any Unemployment Compensation received in 2012

1099 - G - for any Gambling Winnings in 2012

SSA-1099 - for any Social Security Benefits received in 2012

1099-RETIREMENT forms for income from pensions, annuities, distributions from an IRA, 401(k), etc.

Information on any sales of stocks, bonds, real estate in 2012 including original purchase price and date

If you paid Child and/or Dependent Care expenses in 2012, please supply the name, address and social security number or employer identification (EIN) number for the person or agency supplying the services and amount paid per person.

Tuition and related education expenses for post-secondary education, indicate whom paid for

A listing of cash donations including whom paid to and amount paid

A listing of non-cash donations such as Goodwill

Mortgage Interest paid

Real Estate taxes paid

Medical and Dental expenses, including mileage to and from medical appointments, etc.

Employee Business Expenses including union dues, publication subscriptions, job hunting expenses, small tools & supplies, work gloves, etc., business use of personal vehicle, meals & entertainment, uniforms & shoes

Estimated taxes paid showing whom paid to, amount paid and date

Taxes paid showing whom paid to, date paid & applicable year