

Checklist for possible items to bring when dropping off your return:

- Client Information Sheet (filled out)
- W-2s
- 1099 - Int: Interest Statements
- Schedule C - Income & Expense detail
- Schedule D - Stocks purchased & sold
- 1099 - R: Pension Distributions
- Schedule E - Rental Income & Expense detail
- Unemployment Income
- Social Security Statements
- Health Savings distributions/contributions
- IRA Contributions
- Student Loan Interest Paid
- 1098 T - Student Tuition and Fees Paid
- Property Taxes Paid
- Vehicle Registrations
- Mortgage Interest Paid
- Cash Contributions detail
- Non-Cash Contributions detail
- Earned Income Credit - document for each child with their name and address
- College 529 Contributions
- Rental Info - Landlord name & address, # months rented, Amount paid