



"What do I need to bring with me??"

- Dependent birth dates and SS numbers!
- W-2 Forms from your Employer
- W-2G for Gambling income (*proof of losses, too*)
- 1099-MISC miscellaneous forms from Self-Employment
- 1099-INT and 1099-DIV forms for Interest and Dividends earned
- 1099-B forms for sale of stock (*you need to know your cost basis as well*)
- 1099-C Forms for Debt Forgiveness
- 1099-G Forms for Unemployment Benefits received
- 1099-R for IRA or Pension Distributions
- Proof of IRA contributions
- Form SSA for Social Security Benefits received
- Business expenses (*Sole Proprietor*)
- Rental Property Income and Expenses
- Alimony paid or received
- Job related Education Expenses (*teachers*)
- Moving Expenses
- Student Loan Interest paid
- Medical Expenses (*if they are more than 7.5% of your income*)
- Property Taxes paid
- Mortgage Interest paid (*Form 1098*)
- Sales Tax paid (*if you kept track, if not we can use the standard amount, if applicable*)
- Closing Statements, if you bought or sold property
- Charitable Contributions... you figure out what it's worth, please...
- Job-related expenses, mileage, etc...
- College Tuition paid
- Daycare Expenses paid (*Name, address and SS# of the daycare provider as well*)
- Adoption Expenses
- Estimated Tax Payments made
- Other documents marked "Save for tax purposes"
- Payment for our Services

My Appointment with Flower City Tax is on:

Date: ____/____/200__

Time: ____ : ____ AM PM