

Information & Documents Needed to Prepare Your Tax Return

- Social Security numbers for taxpayer, spouse and dependents and names as they appear on card.
- W-2 Wage Statements
- W-2G Gambling Winnings
- 1099's for Interest, Dividends & Pensions
- 1099G Unemployment Statement
- Social Security & Railroad Tier Statements
- Alimony Income or Expense information
- Sale of Personal Residence information
- Sale of Stocks, Investments and other asset information
- Business, Farm and Rental Income and expenses
- 1098T College Tuition paid
- Scholarships received
- Student Loan interest payments
- Jury Duty pay
- All other income
- Moving expense (over 50 miles)