DeRienzo & Rossi
Certified Public Accountants, PLLC.

<u>Things you need to bring to your tax appointment</u>

For all new clients bring:
- Last year's tax return
- Birthdates and social security numbers for every member of your household

Tax Documents for Income
- W-2's
- 1099's
- Jury duty pay
- Alimony you received
- Social Security statement (1099-SSA)
- Dividend and interest statements (1099-DIV and 1099-INT)
- Retirement distributions (1099-R)
- Brokerage statements (1099-B) along with statements showing when your bought and sold your investment.
- K-1 statements reporting profits from partnerships, trust, and small businesses
- Record of income and expenses for your rental property
- Record of income and expenses for your self-employment

Other Tax Documents
- Summary of moving expenses
- Summary of educational expenses
- Summary of your child care, day care, or adult day care expenses
- IRA contributions (traditional, SEP, or rollovers)
- Student loan interest paid (1098-E)
- Amounts paid by installments

Tax deduction documents
- Health care expenses (doctors dentists, health insurance, eye care, medicine)
- Real estate taxes
- Motor vehicle registration
- Mortgage interest paid (1098)
- Gifts to charity
- Last year's tax preparation fees
- Job-related expenses (union dues, job education, uniforms)
- Loss of property due to casualty and theft
- Gambling losses

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