



WHAT TO BRING TO YOUR INTERVIEW

- **Social Security Card(s) - Required**
- **Driver's License/Photo ID - Required**
- **Dependents' Social Security Numbers & Dates of Birth**
- **Last Year's Federal & State Tax Returns (New Clients)**
- **Form 1095-A, or 1095-B, or 1095-C (Health Insurance Form from Insurer)**
- **Wage Statements – Form W-2**
- **Pension or Retirement Income - Form 1099-R**
- **Interest & Dividend Income – Form 1099-INT/ Form 1099 DIV**
- **State Income Tax Refund Amounts – Form 1099-G**
- **Social Security Income – Form SSA -1099**
- **Unemployment Income – Form 1099-G**
- **Commissions Received/Paid**
- **Information of Sales of Stocks or Bonds – Form 1099-B**
- **Self-Employed Business/Farm Income & Expenses – Form 1099-MISC**
- **Lottery or Gambling Winnings – From W-2G**
- **Lottery or Gambling Losses**
- **Income and Expenses from Rentals**
- **IRA Contributions**
- **Alimony Paid or Received**
- **Child Care Expenses & Provider Information**
- **Medical, Eye Care and Dental Expenses**
- **Cash and Noncash Charitable Donations**
- **Record of Purchase or Sale of Residence, including signed HUD-1 statement**
- **Property Taxes Paid**
- **Car Registrations**
- **Mortgage or Home Equity Loan Interest Paid – Form 1098**

