

# *KMM Tax & Accounting Services*

610-803-5718

## **What to Bring to Your Appointment**

- Social Security card(s)
- Driver's License(s) / State Issued ID(s)
- Dependents' Social Security numbers and dates of birth\*
- Wage statements
- W-2s
- Last year's Federal and State tax return
- Self-employment business income and expenses/1099-MISC\*/1099K
- Commissions received/paid\*
- Pension, retirement income/1099-R\*
- Unemployment income/1099-G\*
- Canceled Debt Amount/1099-C\*
- Social Security income/SSA-1099\*
- IRA contributions\*
- Statements on the sales of stocks or bonds/1099-B \*
- Interest and dividend income/1099-INT/1099-DIV\*
- Lottery or gambling winnings/losses\*
- State refund amount/1099-G\*
- Income and expenses from rentals\*
- Alimony paid or received\*
- Record of purchase or sale of residence\*
- Medical and dental expenses\*
- Real estate and personal property taxes\*
- State or local taxes paid
- Sales tax paid\*\*
- Estimated taxes or foreign taxes paid\*
- Cash and non-cash charitable donations\*
- Mortgage or home equity loan interest paid/1098\*
- Unreimbursed employment-related expenses\*
- Job-related educational expenses\*
- Educator expenses\*\*
- Tuition and Education Fees/1098-T\*\*
- Student loan interest/1098-E\*
- Moving expenses\*
- Casualty or theft losses\*
- Child care expenses and provider information\*
- Receipt(s) for qualified energy efficient home improvements\*\*
- Form 1095-A (Health Insurance Marketplace Statement)\*\*\*
- Form 1095-B/1095-C - Health Coverage Statements from Insurer/Employer
  - If Applicable
- \*\* Provision has expired. May be extended by Congress.
- Bring just in case.
- \*\*\* If purchased health insurance through the Federal or a State Marketplace.