



HERE'S WHAT TO BRING TO YOUR APPOINTMENT

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|--|---|
| <input type="checkbox"/> Social Security card(s) | <input type="checkbox"/> Record of purchase or sale of residence* |
| <input type="checkbox"/> Driver's License(s) | <input type="checkbox"/> Medical and dental expenses* |
| <input type="checkbox"/> Dependents' Social Security numbers and dates of birth* | <input type="checkbox"/> Real estate and personal property taxes* |
| <input type="checkbox"/> Wage statements | <input type="checkbox"/> State or local taxes paid |
| <input type="checkbox"/> W-2s | <input type="checkbox"/> Sales tax paid**** |
| <input type="checkbox"/> Last year's Federal and State tax return | <input type="checkbox"/> Estimated taxes or foreign taxes paid* |
| <input type="checkbox"/> Self-employment business income and expenses/1099-MISC*/1099K | <input type="checkbox"/> Cash and non-cash charitable donations* |
| <input type="checkbox"/> Form 1095-A (Health Insurance Marketplace Statement)** | <input type="checkbox"/> Mortgage or home equity loan interest paid/1098* |
| <input type="checkbox"/> Exemption Certificate Number*** | <input type="checkbox"/> Unreimbursed employment-related expenses* |
| <input type="checkbox"/> Commissions received/paid* | <input type="checkbox"/> Job-related educational expenses* |
| <input type="checkbox"/> Pension, retirement income/1099-R* | <input type="checkbox"/> Educator expenses**** |
| <input type="checkbox"/> Unemployment income/1099-G* | <input type="checkbox"/> Tuition and Education Fees/1098-T***** |
| <input type="checkbox"/> Canceled Debt Amount/1099-C* | <input type="checkbox"/> Student loan interest/1098-E* |
| <input type="checkbox"/> Social Security income/SSA-1099* | <input type="checkbox"/> Moving expenses* |
| <input type="checkbox"/> IRA contributions* | <input type="checkbox"/> Casualty or theft losses* |
| <input type="checkbox"/> Statements on the sales of stocks or bonds/1099-B * | <input type="checkbox"/> Child care expenses and provider information |
| <input type="checkbox"/> Interest and dividend income/1099-INT/1099-DIV* | |
| <input type="checkbox"/> Lottery or gambling winnings/losses* | |
| <input type="checkbox"/> State refund amount/1099-G* | |
| <input type="checkbox"/> Income and expenses from rentals* | |
| <input type="checkbox"/> Alimony paid or received* | |

* If Applicable

**If you received health insurance from Marketplace (Exchange)

***If you received an exemption from needing health insurance from the Marketplace (Exchange)

**** Provision has expired. May be extended by Congress. Bring just in case.