

## D & D Tax Service

7001 E. Lancaster #101

Fort Worth, TX 76112

(817)851-1040

### Items to Bring

Completing your tax return will go much faster if we start with all the necessary information. We need the following items. If you are missing some of the below items, just bring what you have and we'll determine in our interview process whether any of the missing information is necessary in completing your return.

2 forms of Identification:

- Picture ID (driver's license, employee ID, Student ID, Passport) for you & your spouse
- Social security cards or proof of social security for you, your spouse & all dependents
- W-2's from each employer (for you and your spouse)
- Unemployment compensation (1099-G)
- Total cash or any other money you received for work performed not included on W-2s or 1099 forms
- If you received non-employment compensation (contract wages) from anyone (1099-MISC)
- If you paid College or other tuition (1098-T)
- Amount of any student loan interest paid (1098-E)
- Information of any moving expenses paid
- If you made any retirement contributions to Individual Retirement Accounts (IRA) or others (KEOGH, SEP, etc)
- If you paid day care – name, address & social security or tax ID number of day care provider & amount paid
- If you have bank/financial accounts – Interest (1099-INT), Dividends & Capital Gains (1099-DIV)
- If you have stock or mutual fund sales (1099-B). Also, bring records regarding your cost basis on property sold.
- If you have pension or retirement income (1099-R) or received social security benefits (SSA-1099)
- If you own a home – records of real estate taxes, mortgage interest (1098)
- State and local sales taxes paid for the year. If you did not keep these records, we will just need sales taxes paid on major purchases (car, motorcycle, motor home, RV, truck, van, or off road vehicle).
- If you own a business – records of all revenue (1099-MISC) and expenses for the business
- If you own rental property – records of all revenue (1099-MISC) and expenses for each rental property
- Amounts paid for any charitable donations, personal property taxes, medical expenses, employee business expenses, or expenses for managing your investments
- If you purchased or sold a home (1099-S) this year, bring all closing statements
- If you had any casualty or theft losses
- Partnership or Trust Income (Schedule K-1)
- Any Alimony paid or received
- Records of any quarterly estimated tax payments
- Any other income - jury duty, gambling winnings, prizes/awards, scholarships/fellowships, state income tax refunds
- Anything else you think might be tax deductible
- A copy of last year's tax return