

Please bring your 2022 tax return and all your 2023 tax documents with you to your appointment.

Examples of potential tax documents that you should bring include but are not limited to the following:

	W2s (WAGE & TAX STATEMENTS)
	1099-INT (INTEREST INCOME)
	1099-DIV (DIVIDENDS & DISTRIBUTIONS)
	1099-B (PROCEEDS FROM BROKER)
	1099 COMBINED BROKERAGE/INT/DIV
	1099-G (CERTAIN GOVERNMENT PAYMENTS)
	1099-MISC. (MISCELLANEOUS INCOME)
	1099-R (DISTRIBUTIONS FROM PENSIONS/RETIREMENT PLANS)
	1099-SSA (SOCIAL SECURITY STATEMENTS)
	1098 (MORTGAGE INTEREST)
	1098-T (TUITION STATEMENT)
	1095-A (HEALTH INSURANCE MARKETPLACE STATEMENT)
	8885 (HEALTH COVERAGE TAX CREDIT)
	K-1 (Tax statement for those who own stock/shares in a company)
	IRA CONTRIBUTIONS (FORM 5498)
	SALE OF RESIDENCE (1099-S)
	Additional comments and other relevant information:
	First Time Home Buyer Info (Form HUD-1)
	Employee Business Expenses (Form 2106)