WHAT TO BRING TO YOUR TAX APPOINTMENT

Current Picture I.D. (driver's license, passport, state issued identification card) **For 2017, even if we have known you for years!**

Social Security Card (you **must** bring either an original card, a copy of the card or a copy of last year's tax return) for yourself and all family members you are claiming, or ITIN's **unless they are already on file**.

Dates of birth for yourself and all family members you are claiming.

Proof of insurance coverage (cards, etc for every person listed on your tax return)

If you are a **new** client, please bring copies of the last 3 years tax returns.

Copies of dependent children's current year tax returns if they have filed before you file.

W-2s for **all** jobs you held in 2017 and any other tax related documents.

Form 1099-G, if you received unemployment insurance in 2017

Form 1099-INT, if you received interest from a bank account in 2017

Form 1099-DIV. if you received and dividends

All Forms 1099-B for stock and investment sales

Form 1099-Misc

Form 1095-A, B, C

Form 1098-T for tuition and fees. **This year also bring in the receipts for this and for books purchased**.

If you are claiming childcare expenses, documentation of expenses and childcare agency's ID or Social Security number of provider.

If you have rental income please provide the **number of days** each property was in rental use.

Please bring the receipts for supply and repair items that are in excess of $2500 that pertain to your business or rental expenses.

If claiming **Earned Income Tax Credit, Child Tax Credit or the College Credits** **please provide evidence of child residing at your address. (school records, medical records, etc.) For 2017….proof is required for all 3 credits.**

A voided check or deposit slip for direct deposit of your refund.

Worksheets for Self-Employment, Farm & Ranch, Rental Income, and Auto Expenses may be downloaded from our website at: **www.fs1040.com** under the Resources tab and in the Client Forms and Worksheets list.

Under the Resources tab and then in the Client Forms & Worksheets list of the website please complete the following items to expedite your visit:

Signed Copy of 2017 Income Tax Return Annual Engagement Agreement
ACA Engagement Letter Addendum
Business Engagement Letter Addendum (For Self Employment, Farm & Ranch & Rentals)
Consent to Use Tax Information unless unlimited time form has been signed and already on record.
Consent to Disclose Tax Information if you want us to discuss your information with **ANY** third party. (This includes having a relative pick up your tax return.**)**
If claiming auto expenses complete the Car & Truck Worksheet and the Confirmation of Written Records for Auto Usage.