

What to bring to your tax appointment?

These are general guidelines; items on the list may or may not apply to your situation

- If you are new to Hawkins Accounting bring a copy of last years tax return
- If you are new to Hawkins Accounting, bring a copy of your, your spouse, and any dependants social security cards
- If you have a new dependant or spouse provide us with the date of birth and copies of social security cards
- All W-2s from each place you worked in 2009
- All 1099s (INT, DIV, B)
- Statements for gambling winnings
- Unemployment form 1099G
- Amount of child support and/or alimony received
- Amount of medical insurance premiums paid
- Amount of Veterans Disability pension received
- Amount of Social Security received
- All 1098 from banks, credit unions, brokerage companies, Tuition statements
- All K-1s from investments in business
- Statement for child care expenses, with the name, address and ID number for the provider
- If you have bought or sold a home or property this year, bring all closing statements
- If you lost a home due to foreclosure or surrender, bring in the 1099C or any documents regarding the cancellation of debt
- Bring in the property tax statements for any property you own
- The name, address of your landlord, and the amount you pay each month
- Amount paid to heat your home (found on the January Consumers bill)
- Bring in receipts for charitable contributions (you must have receipts for all charitable gifts, both cash & non-cash)
- How much do you pay for license plates for your vehicle
- Bring a summary of job related expenses
- Bring a summary of medical expenses
- Self-Employed income and expenses
- If you pay estimates, provide the amount and when it was paid
- If you would like direct deposit, bring in a blank check or a savings account card to verify the routing and account number