



## What to Bring to Your Tax Appointment?

- W-2's form (wages, etc.)
- 1099's form (interest, dividends, etc.)
- Schedule K-1's from Partnerships, S-Corporations, etc.
- Brokerage Statements
- Sales of Stock
- Business Income and Expenses (Self-employed)
- IRA/Pensions Distributions
- Real Estate Taxes
- Home Mortgage Interest
- Charitable Contributions
- Social Security Number for You and All Dependents
- Prior Year Tax Return

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