

2017 Tax Site: What to Bring Checklist

- 2015 tax return: REQUIRED if you itemized deductions in 2015 or carry forward a loss**
- 2015 tax return: ADVISED – tax software change ends our access to prior year returns**
- Valid photo I.D.
- Social security cards or Individual Taxpayer Identification Number (ITIN) cards or letters for all persons listed on the tax return, including all dependents
- Birth date for all persons listed on the tax return
- For direct deposit of refund(s), bring a voided check OR your account number and routing number of your bank
- Income statements or forms for 2016:**
 - Wages from each job (Form W-2)
 - Independent Contractor earnings (Form 1099-MISC)
 - Interest (Form 1099-INT)
 - Dividends (Form 1099-DIV)
 - Retirement Plan Distributions (Form 1099-R)
 - Gambling Winnings (Form W-2G)
 - Unemployment (Form 1099-G)
 - Social Security Benefits (Form SSA-1099)
 - Railroad Retirement Benefits (Form RRB-1099-R)
- Year-end income statements for MFIP, SSI, MSA, GA, veteran's benefits, and worker's compensation
- Receipts for education expenses you paid for your children in grades K-12. For example: tutoring, rental/purchase of instrument, music lessons, pens, pencils, & notebooks
- Tuition expenses you paid to attend a university, college or technical school (Form 1098-T)
- Interest you paid on student loans (Form 1098-E)
- Day care expenses you paid for dependent children, with provider's name, address and tax ID number (EIN or SSN)
- Letters acknowledging charitable donations of cash or up to \$500 in non-cash items
- Purchasers of health insurance in the marketplace:** Documentation of advance premium tax credits (Form 1095-A is required). All others, bring Form(s) 1095-B or -C
- Homeowners:** Mortgage interest & real estate taxes paid in **2016** (Form 1098) & Statement of Property Tax payable In **2017** mailed by the county in March 2017
- Renters:** Certificate of Rent Paid (CRP) in **2016** from each landlord, mailed by January 31, 2017
- Mobile Home Owners:** Statement of Property Tax Payable in **2017** mailed by the county AND Certificate of Rent Paid in **2016** from your landlord