

Your tax preparation appointment is on

(date) \_\_\_\_\_ at (time) \_\_\_\_\_

Bring with you all of the following that may apply to you:

- Copies of your last year's federal and state tax returns
- W-2's for wages (bring all received by all taxpayers on the return)
- Social Security cards for you, your spouse, and dependents
- The Social Security numbers along with names and addresses for all child care providers
- The Social Security numbers of alimony recipients
- Forms 1099 for social security payments, pensions, and IRA distributions received
- Forms 1099 for interest, dividends and investment income distributions
- Forms 1099 for sale of stock or bonds and information on original purchase dates and cost basis
- Forms 1099-MISC for all other income
- Amount of tax-exempt interest and/or dividends received
- Amounts paid for tuition and fees or as interest on a student loan
- Amount of contributions to traditional or Roth IRAs
- Amounts/receipts for itemized deductions (See list on back for further detail)
- W-2G's for gambling winnings and amounts of gambling losses
- For K-12 school teachers, counselors, principals – amount paid for school supplies purchased
- Total paid for day care provider and their tax identification number (SSN or Business EIN)
- If you will have a tax refund and want a direct deposit of the refund to your bank account, bring your checkbook. The routing AND account numbers printed on a check are needed to arrange for the direct deposit.
- To file taxes electronically on a married filing jointly tax return, both spouses must be present to sign the required forms

**TELL YOUR FRIENDS ABOUT THIS COUNSELING SERVICE.**

**IT'S FREE – NO FEE**

**For more information, 360-690-4496, ext. 103**

## **Expenses That may be deductible**

### **Medical and dental expenses**

- Medical and hospital insurance premiums
- Long-term care contracts
- Prescription medications and insulin
- Transportation associated with medical care, including vehicle miles, bus fares, parking fees and bridge tolls
- Unreimbursed charges from doctors, dentists, and other medical specialists
- Hospital service fees (lab work, therapy, surgery, etc.)
- Unreimbursed costs of meals and lodging provided by hospital during treatment
- Cost and care of guide dogs or other animals aiding the blind, deaf or disabled
- Oxygen equipment and oxygen
- Eye surgery to promote correct function of eye
- Special prescribed/required items, such as glasses, contact lenses, hearing aids, false teeth, wheelchair, crutches, artificial limbs
- Stop-smoking programs
- Treatment at a drug or alcohol center
- Part of life-care fee paid to a retirement home designated for medical care
- Wages for nursing services
- Capital expense for equipment or home improvements needed for medical care

### **Taxes**

- State and local income taxes
- Real estate taxes
- Property taxes
- Personal property taxes

### **Interest**

- Home mortgage interest
- Student loan interest

### **Contributions**

- Money or property given to a religious organization, nonprofit organizations (such as Salvation Army, Goodwill, United Way, Boy/Girl Scouts, etc.), nonprofit schools & hospitals, public park and recreation facilities, and veteran's organizations.
- Out of pocket expenses when you serve as a volunteer for a qualified organization

### **Miscellaneous Expense**

- Union dues and expenses
- Work clothes and uniforms that you must wear as a requirement of the job and that can't be worn everyday
- Tax preparation fees
- Certain legal expenses, relating to producing or collecting income or taxes