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1203 East Tarpon Ave.
Tarpon Springs, FL 34689

Family Tax & Financial

What to Bring to Your Tax Appointment

If you are a new client, I will need a copy of your **social security card and all dependents**. I will also need **all birth dates**.

- W-2's.
- 1099's / unemployment income statement.
- Statements of income from all sources.
- End of the year paycheck stub; to verify dues, medical costs, uniforms, charity contributions, etc.
- Interest income statements.
- Stock sale information (including price paid for stocks and dates of purchase).
- Medical expenses (prescriptions, co-pays, insurance premium amount, any out of pocket expenses) for all family members (doctor, dental, vision expenses).
- Property tax statement.
- Mortgage interest statement.
- Closing or refinancing papers if you bought or refinanced a home in the tax year we are preparing.
- Cash contribution amounts and to whom.
- Non-cash contribution amounts /statements or name of organization(s).
- Job related expenses, such as tools, etc.
- Any un-reimbursed job related expenses.
- If you want to direct deposit your refund, you'll need to send a voided check.
- If you purchased a vehicle in the tax year, bring the papers received from the dealer that shows the sales price, dealer prep, destination charges, sales tax, etc.
- If you will be itemizing your return and have saved receipts for sales tax, you will be able to deduct the total sales tax amount unless you pay state income tax.