

WHAT TO BRING TO YOUR TAX APPOINTMENT

You **MUST** bring the following to your tax appointment:

- The original social security card for each person on your tax return
- Proof of identity – such as a driver’s license or picture ID
- Your federal and state tax returns from last year, including all the attachments
- 1095 Health Insurance Coverage Information
- Your W-2’s and any 1099 tax forms you received in the mail, such as Social Security, interest, dividends, pension, IRA distributions
- Copy of your real estate tax bill (if you own your home) or an **original rent certificate signed by your landlord** for the Homestead credit
- Your bank information (routing number and account) if you want your refund safely deposited into your account

Remember, if you are married, both you and your spouse need to attend the appointment.

The following is a comprehensive list of tax forms. You may not have all of these forms, but if you have any of these forms bring them to the appointment. If you aren’t sure if you need a form, it is better to bring it.

- Records of income tax refunds received and balance due paid during 2016
- Records of estimated taxes paid towards 2016 taxes
- 2016 Forms W-2- wage statements from all jobs
- 2016 Forms W-2G - gambling income
- 2016 Forms 1095 - health insurance
- 2016 Forms 1099-INT - interest received
- 2016 Forms 1099-DIV - dividends paid to you
- 2016 Forms SSA-1099 - social security income
- 2016 Forms RRB-1099 and RRB-1099-R - railroad retirement
- 2016 Forms 1099-R - pension income
- 2016 Forms 1099-MISC - non-wage earnings, contract jobs
- 2016 Forms 1099-B - sale of stock (also bring the date you bought it and how much you paid), other investment activity
- 2016 Forms 1099-G - unemployment, tax refunds
- Any other 1099 form you received for 2016
- Records of any other income during 2016, both taxable and nontaxable (for example, alimony, jury duty, SSI, SSD, Wisconsin Works (W2) payments)
- 2016 Forms 1098-T - Tuition payment statements
- 2016 Forms 1098 - Mortgage Interest statements
- Records of amounts paid into or taken out of any IRA or other retirement plan
- Records of any medical expenses, health insurance premiums, charitable contributions, employee business expenses, mileage logs, education expenses, childcare expenses (and childcare provider info including tax ID), or other expenses qualifying you for a deduction or credit
- Records of rent/property tax paid (for any year) during 2016
- For Homestead Credit, your 2016 Property Tax bill or your 2016 Rent Certificate