

CTS4Interview

What to bring, if applicable:

Verification

- Photo ID- State, Military ID or Driver's License
- Social Security card(s) or ITIN #'s
- Dependents Social Security numbers and birth dates
- Last year's Federal and State tax return (only if your not a prior-year client)
- Check for direct deposit

Income

- W-2's / wage statements
- Self-employed business income and expenses 1099 MISC
- Alimony paid or received
- Lottery or gambling winnings and/or losses

- Commissions received or paid
- Pension, retirement income 1099 R
- Unemployment income 1099 G
- Canceled Debt Amount 1099 C
- Social Security income SSA-1099
- Statements on the sales of stocks or bonds 1099 B
- Interest and dividend income 1099 INT / 1099 DIV
- State refund amount 1099 G
- Income and expenses from rental

Expenses

- Child care expenses and provider information
- State or local taxes paid
- Mortgage or home equity loan interest paid 1098

- Real estate tax statements – **Required if Itemizing**
- Personal property tax
- Cash and non-cash charitable donations
- Medical and dental expenses
- Record for sale of property
- Unreimbursed employment-related expenses
- Education expenses
- Educator expenses
- Tuition and Education Fees 1098 T
- Student loan interest 1098 E
- Casualty or theft losses
- IRA contributions
- Estimated taxes or foreign taxes paid
- HUD-1 statement or substitute, if new home purchase

Questions to ask my tax preparer: 

Redding
2662 Bechelli Lane
530-221-8900

Anderson
2695 Balls Ferry Rd.
530-365-5500

Red Bluff
508 Main Street Ste. B
530-529-9829