

Smith Tax & Bookkeeping Services, LLC

What to bring to your appointment



- Social Security card(s)
- Driver's License(s)
- Dependents' Social Security numbers and dates of birth
- Wage statements
- W-2s
- Last year's Federal and State tax return
- Self-employment business income and expenses/1099-MISC*/1099K
- Form 1095-A (Health Insurance Marketplace Statement- Must Have the 1095-A Form, Obama Care Plan, To Receive Refund on Time. Can go to www.healthcare.gov to print out the form needed.)**
- Exemption Certificate Number
- Commissions received/paid
- Pension, retirement income/1099-R
- Unemployment income/1099-G
- Canceled Debt Amount/1099-C
- Social Security income/SSA-1099
- IRA contributions
- Statements on the sales of stocks or bonds/1099-B
- Interest and dividend income/1099-INT/1099-DIV
- Lottery or gambling winnings/losses
- State refund amount/1099-G
- Income and expenses from rentals
- Alimony paid or received
- Record of purchase or sale of residence
- Medical and dental expenses
- Real estate and personal property taxes
- State or local taxes paid
- Sales tax paid
- Estimated taxes or foreign taxes paid
- Cash and non-cash charitable donations
- Mortgage or home equity loan interest paid/1098*
- Unreimbursed employment-related expenses
- Job-related educational expenses
- Educator expenses
- Tuition and Education Fees/1098-T
- Student loan interest/1098-E
- Moving expenses
- Casualty or theft losses
- Child care expenses and provider information