cann tax service

What Should I Bring to my Tax Appointment?

If you are a new client, please bring the following:

- Social Security cards for yourself, your spouse, and your dependents
- Drivers License(s)
- Birth Dates(s)
- Copy of last year's tax return
- Voided check with the financial account and routing numbers, if you want to use direct debit or deposit for tax payment or refund

For both new and returning clients, bring:

1. Records of all income received during the tax year such as:
    a. W-2s for wages, 1099s for interest, dividends, retirement distributions, unemployment, state income tax refunds, Social Security, etc.
    b. Tip income records
    c. Records of gambling profits and losses
    d. Cash income received record, such as from odd jobs and tips
    e. Alimony received
    f. Capital gains and losses records, such as brokerage account annual statements
    g. Form K-1s from any estates, partnerships or S-corporations. These usually are not sent out until March.
2. Amount of IRA/401K contributions and distributions
3. Amounts paid for child care and to whom (name, address, SSN or EIN)
4. Tuition and other education expenses paid for you, your spouse, and/or dependents
5. Student loan interest paid
6. Record of any estimated taxes paid to IRS or a state
7. Property tax receipts
8. Form 1098 (or other) reporting home mortgage interest
9. Receipts or record of medical, drug, and dental un-reimbursed expenses, including medical insurance or long term care insurance premiums Itemized record of charitable gifts. Any over $500 must include a signed receipt from the charity.
10. Any records related to starting or operating your own business, including rental property

Year End Bookkeeping is available for Small Business owners at an additional cost.

IF YOU ARE STILL NOT SURE WHAT TO BRING, BRING IT ALL.

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