

Tax World, Inc.	
Items to Bring to Tax Appointment	
New Customers	
	Prior year tax return
	Social Security cards and DOB for client, spouse and dependents
New and Returning Customers	
	W-2's
	1099's - Interest, Dividends, Unemployment, Retirement Income, Social Security, State Tax Refunds
	Individual Retirement Account contributions or withdrawals
	Unemployment income statements
	Trust, "S" corporation, and/or Partnership income amounts (K-1)
	Mortgage and Home Equity Loan Interest
	Property and School Taxes
	Charitable Contributions (cash and noncash documentation)
	Stock Sales - Purchase and Sale Information
	Profit and Loss Statement from Small Business or Rental Properties
	IRA Contributions
	Education Expenses - copies student loan documents and billing statements from school
	Student Loan Interest
	Employee Expenses - Travel, Meals, Uniforms, etc.
	Moving expenses (if move was job related)
	Statement on Sale Or Purchase of a Home
	Dependent Care Expenses (including name, address, SSN, and TIN of provider)
	Record of Estimated Federal or State Tax Payments
	Sales Tax paid on auto purchases and capital improvements to home
	Earned Income Credit verification (see below for acceptable forms, only one item needed)
	Residency verification items
	School records or statement
	Landlord or property management statement
	Health care provider statement
	Medical records
	Child care provider records
	Placement agency statement
	Social services records or statement
	Indian tribal official statement
	Employer statement (on letterhead)
	Disability verification items
	Doctor statement
	Other health care provider statement
	Social services agency or program statement
	Mileage log (as applies, if no mileage log is provided - no deduction will be given)
	If you own rental property or a small business, we will need to see records pertaining to activity