

WHAT YOU NEED TO FILE YOUR TAXES

Make sure to bring these information on your appointment. You may also email them to: ihass@comcast.net or fax to 888-641-8842. Call if you have any question to 425-697-3674

Personal Information

FOR YOU & ANYONE LISTED ON YOUR RETURN

Identification Information

	Tax Payer	Spouse
Driver's Licence/State ID #	_____	_____
State Issued:	_____	_____
Date Issued:	_____	_____
Expiration Date:	_____	_____

- SSN or ITIN, full names and birth dates for everyone included on your return

Names	Birth Dates	SSN/ITIN	Relationship

- Amount of alimony paid and ex-spouse's social security number (if applicable)
 Amount : _____ | Ex-Spouse's SSN: _____
- Childcare records, (including the provider's ID number) if applicable
- Copy of your last year's tax return (Or most recent filed tax return)

Income/ Investments/ Retirement

- All forms that say W-s, 1098, 1099, or Schedule K-1
- Purchase date and total investment in any stocks or property you sold
- Expenses related to your investments
- Records of any contributions you made to IRAs, other retirement plans, and 529 plans or education savings accounts
- Records of business income and expenses if you are an independent contractor, self-employed, or own rental real estate

Education

- Education scholarships and fellowships
- Records of tuition and other higher education expenses, and Form 1098-T

Itemized Deductions

- Form 1098
- Mortgage interest, real estate and personal property tax records
- Prior years amount of state/local income tax paid
- Records of cash amount donated to houses of worship, school and other charitable organizations
- Records of non-cash charitable donations (dues, travel, publications, tools, uniform cost, and cleaning)
- Job search/moving expenses, if applicable