

I am a new client. What documents should I bring?

- If you have never filed your tax return with us, you should bring these documents or information if you have them.
- The names and birth dates of everyone in your household (you, your spouse and any children born before the end of the tax year.)
 - Last year's tax return, if you filed.
 - Form W-2's from all of your and your spouse's jobs during the year.
 - Records of all other income, such as interest on your bank accounts and tips. If self-employed, bring a detailed, itemized list of your income and expenses.
 - Social Security Cards and picture ID's for your children, yourself, your spouse, and all other dependents and family members.
 - Information about expenses that you think might help reduce your taxes, such as receipts from childcare providers (including provider's tax identification number), mortgage interest statements, donations to your church, costs incurred in seeking a college degree or taking courses to acquire or improve job skills, and proof of payment of medical insurance premiums covering your children.
 - If you are married and filing jointly, your spouse must come with you.
 - If you want your refund directly deposited to your checking account, bring a voided blank check. If you want your refund directly deposited to your savings account, bring your bank routing number and your savings account number. Make sure the bank's name and the routing number are current and correct.
 - Proof of any other income received.
 - Proof of any business expenses you might have had - for example, receipts from the purchase of uniforms required by your employer.
 - Form 1099-G, which shows how much you received in unemployment insurance benefits.
 - Form 1099-INT, which shows how much interest you received from a bank or mutual fund.
 - Any other tax reporting forms you have received, such as a Maryland form reporting your receipt of a state tax refund.
 - If you own a house, bring statements from your mortgage company or home equity loan, and proof of any real estate tax you paid.
 - Documentation of any amounts you contributed to an IRA or other retirement plan.
 - Documentation of child care and medical expenses.
 - Notice 1319: For Advance Child Tax Credit last year (If you do not know the amount go to www.irs.gov and type "Notice 1319" in the search box.)
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