

## **REQUIRED ITEMS FOR FILING TAXES**

- Economic Recovery Payment (\$250 SS, SSI, RR, Veteran Disability Recipients).
- W-2 (wages or salaries from all employment during the year).
- Disability Income.
- Interest from checking or savings account, bonds, CD, or brokerage account.
- State tax refund (if itemized last year).
- Alimony income.
- Pension and/or IRA distribution (1099).
- Unemployment.
- Social Security or Railway Retirement.
- Self-employment.
- Other income such as gambling winnings, awards, prizes and Jury Duty.
- Education expenses (1098T).
- Home mortgage payments (1098).
- Real Estate Tax.
- Mortgage Insurance Premiums.
- HUD Statements First Time Homebuyer Credit.
- Energy Conservation Incentives.
- Charitable Contributions.
- Child/dependent care expenses (Childcare provider ID or SSN)
- Estimated tax payments.
- Amounts of other income.
- Bank Account Information (to electronically file tax return).
- Social Security card for spouse married during year 2012.
- Power of Attorney if filing a joint return if spouse is not present.
- Social Security or ITIN Number for all dependents claimed on tax return.
- Dividend information.
- All rental property information if claiming rental income.
- Tax record for previous year.
- For State tax return, County, and School District.
- Any Information you think will help properly prepare your tax return.