

# 2014 Tax Site: What to Bring Checklist

- Valid picture I.D.
- Social Security cards or Individual Taxpayer Identification Number (ITIN) cards or letters for all persons listed on the tax return (including all dependents)
- Birth Date for all persons listed on the tax return
- Prior year's tax return
- For Direct Deposit of your refund, bring a voided check OR your savings account number and routing number of your bank
- Income statements or forms for 2013:**
  - Wages from each job (Form W-2)
  - Independent Contractor earnings (Form 1099-MISC)
  - Interest (Form 1099-INT)
  - Dividends (Form 1099-DIV)
  - Retirement Plan Distributions (Form 1099-R)
  - Gambling Winnings (Form W-2G)
  - Unemployment (Form 1099-G)
  - Social Security Benefits (Form SSA-1099)
  - Railroad Retirement Benefits (Form RRB-1099-R)
- Year end income statements for MFIP, SSI, MSA, GA, veteran's benefits, and worker's compensation
- Receipts for education expenses you paid for your children in grades K-12. For example: tutoring, rental/purchase of instrument, music lessons, pens, pencils, and notebooks.
- Tuition expenses you paid to attend a university, college or technical school (Form 1098-T)
- Interest you paid on student loans (Form 1098-E)
- Day care expenses you paid for your children. Bring provider's name, address, and tax ID or Social Security Number
- Letters acknowledging charitable donations of cash or non-cash items
- Homeowners:** Mortgage interest and real estate taxes paid in **2013** (Form 1098) and Statement of Property Tax payable in **2014** mailed by the county in March 2014
- Renters:** Certificate of Rent Paid (CRP) in **2013** from each landlord, mailed by January 31, 2014
- Mobile Home Owners:** Statement of Property Tax payable in **2014** mailed by the county AND Certificate of Rent Paid in **2013** from your landlord.