DOCUMENTS TO BRING TO YOUR TAX APPOINTMENT

Thank you for choosing L&M Tax Services for your personal tax needs. We look forward to assisting you and offer the following information to help you make the most of your appointment.

Please provide Social Security cards for yourself and for each dependent. This helps eliminate electronic filing errors by making sure the name and Social Security Number matches the IRS records for each person on the tax return.

Also bring documents to show all your income for the year. These documents may include:

- W-2s from your employers,
- 1099-MISC forms for self-employment income,
- 1099-INT (interest) and 1099-DIV (dividends) forms,
- 1099-B forms showing brokerage trades in stocks and bonds,
- K-1 forms for income from a partnership, small business, or trust,
- 1099-SSA form showing Social Security received.

Be sure to bring written documents for additional income not reported on a W-2 or 1099 form, such as other self-employment income, rental income, or alimony. This could be a spreadsheet, bank statements, or other written evidence.

Bring canceled checks, receipts, or spreadsheets for any tax-related expenses. This may include contributions to your traditional or SEP-IRA, moving expenses, college expenses, medical and dental expenses, real estate taxes, gifts to charities and churches, and daycare or childcare costs. Some expenses are reported to you. Mortgage interest, for example, is reported to you on form 1098, and student loan interest is reported on form 1098-E.

If you paid estimated taxes, bring a summary of your federal and state estimated payments and canceled checks.

It is our pleasure representing you and we thank you for your confidence in us.

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