*As an Enrolled Agent we are **ethically bound** to help you pay the lowest tax you are legally required to pay. This list will help us do our job. It is a concise, though not exhaustive, outline of some of the documents we will need when we meet with you.*

- A copy of last year's Federal and State tax returns.
- All statements of income, such as:
  - W-2's
  - Interest and Dividend statements (Form 1099)
  - Pension income amounts including Social Security
  - Individual Retirement Account contributions or withdrawals
  - Unemployment income statements
  - Trust, "S" corporation, and/or Partnership income amounts (Form K-1)
- Amounts of mortgage interest and points paid (Form 1098), real estate and auto excise taxes paid, charitable donations (both cash and non-cash), and "out-of-pocket" medical expenses
- Records of child care expenses including amounts and payee
- Lists of any job related expenses, such as:
  - Moving expenses (if your move was job related)
  - Tools and other equipment such as computers, etc.
  - Safety clothing and uniforms
  - Professional books, journals, dues, union dues, etc.
- Amounts of any estimated tax payments
- Details of any capital gains transactions
- If you own rental property or a small business, we will need to see the records pertaining to the property or business

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