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## **WHAT TO BRING TO YOUR TAX INTERVIEW**

- Taxpayers' Social Security Numbers and Dates of Birth
- Dependents' Social Security Numbers and Dates of Birth
- Last 3 Years' Federal and State Tax Returns
- Wage Statements – Form W-2
- Pension or Retirement Income – Form 1099-R
- Interest and Dividend Income – Form 1099-INT/Form 1099-DIV
- State Income Tax Refund Amount – Form 1099-G
- Social Security Income – Form SSA-1099
- Unemployment Income – Form 1099-G
- Commissions Received/Paid
- Information of Sales of Stocks or Bonds – Form 1099-B
- Self-Employed Business/Farm Income & Expenses – Form 1099-MISC
- Lottery or Gambling Winnings – Form W-2G
- Lottery or Gambling Losses
- Income and Expenses from Rentals
- IRA Contributions
- Alimony Paid or Received
- Child Care Expenses & Provider Information
- Medical, Eye Care and Dental Expenses
- Cash and Noncash Charitable Donations
- Record of Purchase or Sale of Residence
- Mortgage or Home Equity Loan Interest Paid – Form 1098