Dunn, Pedro & Butler
Certified Public Accountants

What to bring to your appointment:

General Information:
- Change of Marital Status
- Change of Address / Phone
- Occupation change
- Health Insurance Coverage
- Estimated Taxes Paid
- Alimony Paid
- IRA Contributions
- Student Loan Interest Paid
- Self-Employed Retirement Plan
- Health Savings Accounts (1099 SA)
- Driver's License (Taxpayer and Spouse)

New or Change of Dependents
- Name as appears on social security card
- Social Security Card
- Date of Birth
- Proof of Residency

Income:
- Wages (W2's)
- Interest / Dividends (1099 INT / 1099 DIV)
- State Tax Refund
- Social Security Statement(s)
- Unemployment Compensation (Get 1099 online)
- IRA & Pension Distributions (1099 R)
- Gambling Winnings (1099 G)
- Sale of Stocks / Bonds (1099 B)
- Partnership or Corporate K1's
- Alimony received

Schedule C (Business):
- Gross Income (1099 Misc)
- New Assets: date in service
- Self-Employed Health Insurance
- Home Office Expense
- Auto Expenses/Mileage (including beginning and ending mileage)

Schedule E (Rental/Royalty):
- Rent / Royalties (1099 Misc)
- Capital Expenses: date placed in service
- Rental Expenses

Itemized Deductions: Will need for State Returns
- Medical - Long-term care insurance; Prescriptions, co-pays, doctors, dentists, Mileage to and from; Eye-glasses, etc.…
- Real Estate Taxes
- Home Mortgage Interest
- Home Mortgage Insurance
- Cash Contributions
- Non-Cash Contributions
- Casualty and Theft Loss
- Unreimbursed Job Expenses
- Investment Expenses
- Tax Prep Fees

Credits & Other Expenses:
- Child Care: provider name, ID#, address
- Tuition and Fees: 1098-T Required
- Adoption Fees
- Electric Vehicle Purchase Receipt
- Solar Electric/Heating Home Improvement
- Form's 1095: A-from an exchange
- B-from your insurer
- C-from your employer

State:
- Long-term care insurance
- Driver's License or Gov't Issued ID
- Section 529 plan (Tuition/ABLE Plan)
- Sales & Use Tax (online or out-of-state purchases)
- STAR Check Stub
- Property Tax Relief Credit