### *What should I bring to my tax appointment at Fair Tax?*

**If you are a new *Fair Tax, Inc.* client, please bring last year's tax return (if available).**

# For … Please bring …

|  |  |
| --- | --- |
| Taxpayer(s)\* | Social Security cards and current photo ID(s) |
| Dependent(s) | Dependent Social Security Card(s) |
| Wage or Salary | W-2s |
| Dividend or interest income, pension payments, social security benefits, unemployment income | Forms 1099-DIV, 1099-INT, 1099-R, 1099-G |
| Healthcare Premium Tax Credit | Form 1095A, 1095B, or 1095C |
| Child/Dependent Care expense | Provider's Name\*, Address\*, SSN or EIN\*, and amount paid  \*If you are a renewal client and this information has not changed from last year, you do not need to bring it with you |
| Tuition expense | Statement from school showing amount paid (1098-T) |
| Interest paid on student loan | Statement showing interest paid |
| Home ownership expenses | Statement showing amounts paid for mortgage interest (Form 1098) and real estate taxes |
| Charitable donations | Organization name(s) and amounts donated |
| Sale of stocks, bonds, mutual funds or other securities | 1099-B (showing sale proceeds) and statements showing original cost of securities sold |
| In-Home Daycare Provider  Self-employment  Home office  Rental Property  Over-the-road Truckers | Checklists for any of these situations are available at www.fairtaxinc.com  or by calling us at 336-1669. |
| Income or expense not listed above | Please call ***Fair Tax, Inc.*** if you have questions regarding what to bring. |

## **\*\*\*IMPORTANT\*\*\***

\* If you are filing a joint tax return, both taxpayers must sign a form at our office.

**If you have any questions about what to bring,**

**please don’t hesitate to call *Fair Tax, Inc*. at 336-1669 or e-mail us at** [**Info@fairtaxinc.com**](mailto:Info@fairtaxinc.com)

*h:\worddocuments\fair tax documents\document checklist.doc2/3/2017 4:43 PM*