

## What to bring to your Appointment

The following is a general list of items to bring in with you. Keep in mind that every taxpayer's situation is unique. When in doubt bring the item in question to your tax appointment.

### Prior Year Tax Return Copies

- 👉 If you are a new client, please bring copies of your last 3 years federal & state income tax returns. Toro Taxes will review them for FREE, and we may be able to amend mistakes/omissions getting you back additional refunds missed.

### Personal & Dependent Information

- 👉 Unexpired Government Issued Id's (Taxpayer & Spouse)
- 👉 Social Security or ITIN Numbers with date of births for anyone who'll be on your tax return
- 👉 Childcare payment records with licensed provider's ID number(s)

### Information about your Income

- 👉 Bring any & all W2's, 1098, 1099, & Schedule K-1 Forms
- 👉 Self-Employment Business Income & Expenses / 1099-Misc / 1099K
- 👉 Commissions received/paid
- 👉 Pension, retirement income/ 1099-R
- 👉 Unemployment Income/1099-G
- 👉 Canceled Debt Amount/1099-C
- 👉 Social Security Income/ SSA-1099
- 👉 Statements on the sales of stocks or bonds/1099-B
- 👉 Interest & Dividend Income/1099-INT/1099-DIV
- 👉 Lottery or Gambling Winnings/Losses
- 👉 State refund amount/1099-G
- 👉 Income & Expenses from rentals
- 👉 Record of purchase or sale of residence

### Adjustments to your Income

- 👉 Student Loan Interest Paid/1098-E
- 👉 Tuition & education fees paid (or receipts/checks for tuition paid for post-high school) 1098-T
- 👉 IRA Contributions
- 👉 Medical Savings Account (MSA Contributions)
- 👉 Alimony paid or received

## Expenses

- 👉 Out-of-Pocket Medical & Dental Expenses
- 👉 Cash & Non-Cash Charitable Donations
- 👉 Unreimbursed employment related expenses (Travel, mileage/vehicle expenses, uniforms, tools)
- 👉 Job Search/Moving Expenses
- 👉 Casualty or Theft Losses
- 👉 Child Care expenses and provider information
- 👉 Receipts for qualified energy efficient home improvements.

## Taxes you've paid

- 👉 State or Local Income Taxes Paid
- 👉 Real Estate Taxes & Personal Property Taxes Paid
- 👉 Vehicle License Fees based on values of vehicle
- 👉 Mortgage or home equity loan interest paid/1098

## Health Care

- 👉 Form 1095-A (Health Coverage Marketplace Statement)
- 👉 Form 1095-B / 1095-C (Health Coverage Statements from Insurer/Employer)
- 👉 If applicable, Marketplace exemption certificate

Please note that the above list is intended to provide a generalized idea of what to bring to your tax appointment. It does not give personalized tax or legal advice. Before taking action, you should always seek assistance of a professional who knows your particular circumstance.

If you have any questions or would like to book your appointment contact us at

(214) 945-0527 or [info@torotaxesdtx.com](mailto:info@torotaxesdtx.com)