

## **REQUIRED ITEMS TO BRING WITH YOU TO YOUR APPOINTMENT**

- Both spouses must be present to file joint returns unless the absent spouse has prepared a power of attorney that allows the other spouse to file and sign a tax return for him or her. Bring the valid power of attorney. IRS has a power of attorney as well, Form 2848.
- Social Security cards are required for the Soldier, spouse and all family members being claimed on the tax return.
- Dates of birth of Soldier, spouse and all family members being claimed.
- Bring originals of all W-2s. *NOTE* - Substitute W-2s are not eligible for filing until after 15 February 2012. W-2s will become available for military online around 20 January 2012, retirees about 16 December 2011 and for civilians 6 January 2012. The Tax Center will not have your W-2s, thus you should download your military W-2s from your myPay account prior to coming in.
- If you have any interest income from banks or stocks, bring Form 1099-INT or for dividends Form 1099-DIV.
- If you receive any unemployment compensation, bring Form 1099-G.
- If you receive pension compensation, bring Form 1099-R.
- If you paid interest on your mortgage, bring Form 1098.
- If you expect the Armed Forces to pay on your Student Loan, inquire about the W-2 or get a print out from Finance. For any other payment you made on your Student Loan, the organization will send you the necessary information. If you do not receive that confirmation of paid interest, contact the organization.
- If you claim any education expense, provide your student registration for itemized expenses paid and any loans/grants that were to be applied, along with the Form 1098-T to see if it matches what the school said you paid. Do not forget the receipts for books.
- If you are claiming an exemption for a person who is in someone else's legal custody, you will need IRS Form 8332 signed by the custodial person even if you have a court order or other divorce paperwork saying you may claim the exemption for that person.
- Adoption paperwork and expenses.
- To take the child-care deduction, you will need the provider's name, Social Security number or TIN number, the address and the total amount paid to your child-care provider. Most child-care providers give you an itemized statement with this information.
- If you intend to itemize any charitable deductions, bring a letter from the church or official party that received the benefit.

- Bring last year's federal and state tax documents. To prepare your state return we must have last years' copy, if you want assistance with this years' obligation to the state.
- Bring last years' tax return if you had rental property, depreciation, itemized deductions or capital gains or losses.
- If you want to have your refund directly deposited into your checking or savings account, bring a check or other confirmation of your routing number and bank account number.
- For Louisiana residents, remember to bring your homeowners insurance statement to receive any additional credits.