

# **What to bring to your Jackson Hewitt Tax Interview**

## **Identification for Electronic Filing and Bank Products:**

- Picture ID for you and your spouse
- Social Security Cards for you and your spouse
- Dates of Birth for you and dependants
- Name and phone number of a relative not living with you
- Child care provider name, address and SSN or EIN

## **Sources of Income:**

- W-2 Wage Statements
- Pension, Retirement Income- 1099- R
- Interest and Dividends
- Commission
- Sales of Stocks and Bonds
- Lottery and Gambling Winnings
- State Refund amount from last year
- Social Security Income
- Unemployment Compensation
- Income from rentals
- Alimony received
- Sale of Residence
- All 1099 Forms
- Quarterly payments Federal and State
- Child Care Expenses
- IRA Contributions
- School Tuition and Student Loan Interest

## **Self Employment Income:**

- Advertising
- Car and Truck Expenses
- Total Business Miles
- Legal and Professional
- Office Expenses
- Rent or Lease Payments
- Utilities and Telephone
- Repairs and Maintenance
- Supplies
- Taxes and License
- Travel
- Meals
- Recertification/ License
- Professional Publications
- Credit Card Fees
- \_\_\_\_\_ Other

## **Personal Expenses for Itemized Deductions:**

- Medical and Dental Expenses
- Real Estate Taxes
- Personal Property Tax such as vehicle registration fees
- Home Mortgage and Home Equity
- Foreign Taxes Paid
- Non- Monetary Charitable contributions
- Monetary Charitable contributions
- Unreimbursed Employee Expenses
- Investment Expenses
- Gambling Losses
- Estimated and Quarterly payments Federal and State
- Child Care Expenses
- IRA Contributions
- Self Employment Expenses
- Business Mileage
- School Tuition and Student Loan Interest

**Please bring last year's tax return if we did not prepare your return, or you are going to a different office.**

