

# At EXPRESSTAX, Your Money's Waiting. You're Not.

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Professional for Fast & Accurate Service.

## What To Bring To Your Tax Interview:

*(Where applicable for your personal situation)*

- Social Security Card(s)
- Driver's License(s)
- Dependents' Social Security numbers and dates of birth
- Wage Statements (W-2)
- Last year's return (if available)
- Pension, Retirement Income, 1099-R(s)
- Interest and Dividend Income
- Commissions
- Sales of stocks or bonds
- Self-employed business income & expenses
- Lottery or Gambling winnings/losses (W-2G)
- State Tax Refund (1099-G)
- Social Security/ Unemployment Income (SSA-1099)
- Rental Property Income and Expenses
- Alimony Paid or Received
- Record of Purchase or Sale of Residence
- Medical and Dental expenses
- Real estate and personal property taxes
- Estimated taxes or foreign taxes paid
- Cash and non-cash charitable contributions
- Mortgage or home equity loan interest paid
- Un-reimbursed employment related expenses
- Job related educational expenses
- Child care expenses and provider information
- Education Expenses (if any)
- Moving Expenses (if any)
- Proof of Stimulus Rebate amount

# **EXPRESSTAX**

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**My Tax Professional is located at:**

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**Phone number** \_\_\_\_\_