Before your tax interview, organize your important documents using the checklist below. Documentation will vary based on your situation and you may not have every item.

- ❑ Name of each family member
- ❑ Date of Birth of each family member
- ❑ Social Security Card/ITIN/ATIN of each family member
- ❑ Last Year's Tax Return
- ❑ Bank Account Number and Routing Number for direct deposit
- ❑ W-2's
- ❑ Interest (1099-INT or substitute)
- ❑ Dividend Slips (1099-DIV or substitute)
- ❑ Stock Sales (1099-B or Broker Statement)
- ❑ Self-Employment Income and Expenses
- ❑ Sale of a Personal Residence
- ❑ Rental Income and Expenses
- ❑ Sale of any Business Assets
- ❑ Gambling or Lottery Winnings (W-2G for some winnings)
- ❑ State Income Tax Refund (1099-G)
- ❑ Pension Income (1099-R)
- ❑ Social Security or Railroad Retirement (SSA-1099 or RRB-1099)
- ❑ IRA or 401(k) Distribution (1099-R)
- ❑ Unemployment Compensation (1099-G)
- ❑ Miscellaneous Income (1099-MISC)
- ❑ Medical Expenses
- ❑ Real Estate or Personal Property Taxes
- ❑ Mortgage Interest
- ❑ Charitable Contributions (cash and non-cash)
- ❑ Employee Business Expenses
- ❑ Gambling Losses
- ❑ Moving Expenses
- ❑ Traditional IRA Contributions
- ❑ Higher Education Expenses
- ❑ Educator Expenses
- ❑ Student Loan Interest
- ❑ Child/elderly Care Provider
- ❑ Adoption Expenses
- ❑ Retirement Savings Contributions Credit
- ❑ If self-employed, Estimated Tax Payments made during the year
- ❑ Foreign Bank Account Information.

For more information or to find a SiempreTax+ location near you, please visit http://www.siempretax.com