



# Joy's Tax Services

## WHAT TO BRING

**Wondering what paper work you need to bring to your tax interview?**

**Save time and money by going to your tax interview prepared with all the documents you need. Let us at Joy's Tax Services help you.**

**Here is a list for you to reference:**

- Wage statements/W-2s
- Self-employment business income and expenses/1099-MISC
- Commissions received/paid
- Pension, retirement income/1099-R
- Unemployment income/1099-G
- Canceled Debt Amount/1099-C
- Social Security income/SSA-1099
- IRA contributions
- Statements on the sales of stocks or bonds/1099-B
- Interest and dividend income/1099-INT/1099-DIV
- Lottery or gambling winnings/losses
- State refund amount/1099-G
- Income and expenses from rentals
- Alimony paid or received
- Record of purchase or sale of residence
- Medical and dental expenses
- Real estate and personal property taxes
- State or local taxes paid
- Estimated taxes or foreign taxes paid
- Cash and non-cash charitable donations
- Mortgage or home equity loan interest paid/1098
- Un-reimbursed employment-related expenses
- Job-related educational expenses
- Educator expenses
- Tuition and Education Fees/1098-T
- Student loan interest/1098-E
- Casualty or theft losses
- Childcare expenses and provider information
- Social Security card(s)
- Driver's License(s)
- Dependants' Social Security numbers and dates of birth
- Information concerning your Stimulus payment check
- Last year's Federal and State tax return

**JOYS SERVICES - GRANVILLE, NY**

**Phone: 518-642-3230 • Fax: 518-642-3230 • <mailto:joy@joystaxservices.com>**