

# Preparing For your Tax Interview

## Personal Information For Each Family Member

Name  
Date of Birth  
Social Security Card or Tax ID  
Last Year's Tax Return  
Valid Driver's License

## Tax Credits

Child Care Provider Info  
Adoption Expenses  
Retirement Savings Contributions Credit

## Income Tax Information

W-2's  
Interest (1099-INT)  
Dividend Slips (1099-DIV)  
Stock Sales (1099-B)  
Self-Employment Income and Expenses  
Sale of Real Estate  
Rental Income and Expenses  
Sale of any Business Assets  
Gambling or Lottery Winnings (W-2G)  
State Income Tax Refund (1099-G)  
Pension Income (1099-R)  
Estimated Taxes Paid  
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)

## Deductions & Adjustments

Medical Expenses  
Real Estate or Personal Property Taxes  
Mortgage Interest  
Charitable Contributions  
Employee Business Expenses  
Gambling Losses  
Moving Expenses  
Traditional IRA Contributions  
Higher Education Expenses  
Educator Expenses  
Student Loan Interest