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The following is a checklist of items to bring for your tax appointment:

- Any correspondence that you received from either the IRS or NYS
- A Driver’s License or Non-Driver Identification

Income Statements: (Please bring all original documents with you)

- W-2 forms-all copies (food service workers bring in your tip books if they are not included on your W2’s)
- Social Security statements (SSA-1099)
- Pension/IRA withdrawal end-of-year documents(1099-R)
- Interest received on savings accounts (1099-INT)
- Year-end brokerage accounts statements/ 1099-B or 1099 consolidated statement
- Bankruptcy or forgiveness of debt (1099-A & 1099-C)
- Total amount of alimony received
- K-1s from partnerships, investment companies, estate, etc.
- Lottery and gambling winnings: any other prizes
- Alimony received
- Other miscellaneous earnings:1099-K, jury duty, hobbies, gambling, election official, etc.

Expenses: (Please bring in receipts except for medical expenses)

Medical expenses (please bring in TOTALS ONLY: Do not include amounts your insurance paid for you)

- 1095 A, B, or C
- doctor bills _____
- hospital and nursing home fees _____
- cost of prescription drugs _____
- insurance premiums (private pay and long-term care) _____
- dental fees _____
- glasses _____
- hearing aids & batteries _____
- miles driven to obtain medical care _____

- Home mortgage statements (Form 1098)
- Home equity statements **only if used for home improvements.** From 2018-2025 HE interest CANNOT be claimed unless the proceeds are used to buy, build or substantially improve the taxpayer’s home that secures the loan.
- Real estate taxes paid on your home (often reported on mortgage statement)
- Charitable contributions given by cash or check (you must have a written receipt from the organization, no matter how small the contribution)
- Adoption expenses

Job expenses:

- Union or professional dues _____
- Cost of safety shoes and equipment _____
- Education expenses to keep your present job _____
- Miles driven for your employer’s convenience _____
- Job related travel records _____
- Safe deposit box fees _____
- Investments expenses _____
- Childcare or dependent care & summer day camp expenses
 - Provider’s name _____
 - Address _____
 - Social Security # or EIN _____
 - Total amount paid to each provider for each _____
 - Contribution to your IRA (s)
 - Traditional _____
 - Roth _____

- Alimony paid (not child support) and receipt’s name and SSN (please bring in proof of payments such as cancelled checks / money order receipts and your divorce or separation papers)
- Education expenses: Tuition and lab fees, books, student loan (Forms 1098-T & 1098-E are usually mailed to the student’s address.)

Other considerations:

If you are self-employed:

- Gross income
- Any expenses related to your business, including loan interest (if you have any questions, bring the information in with you)
- Car Information: Self-employment miles, commuting to regular job miles, and total miles put on your car during the year for all reasons plus purchase loan interest
- Inventory Expenses (if applicable):
 - beginning inventory value
 - purchases during the year
 - value of items taken out of inventory for personal use
 - ending inventory listing & value

If you own rental property:

Total rent received (security/damage deposits are only included as “rent received” in the year a tenant forfeits the deposit)

- Amounts received from assistance programs

Expense totals to operate rental:

- Statements of taxes and mortgage interest
- Total of improvements
- Advertising
- Repairs/maintenance
- Miles you drive to tend property (See “Car Information” under “Self Employed”)
- Other expenses

Ask us for a special rental income & expense worksheet

If you are separated or divorced: (IRS rules: If you are “separated” you are not required to file a joint return if certain criteria apply)

- Separation or divorce decree documents
- Separated or divorce not final by December 31? Bring in spouse/ex-spouse income paperwork if possible; you may not benefit by filing separate returns.
- Must have lived apart for the last six months of the year (June 30th - December 31st)
- Custodial parent of child

*If you are a non-custodial parent and this is your year to claim the child(ren), please contact us as soon as possible to obtain a “Release of Exemption” claim Form 8332, no matter what your divorce or separation papers indicate.

*Note: Divorce or separation creates its own set of income tax consequences. Please keep in mind when talking with your attorney. Empower Tax Services is open year-round for consultation.

If you sold stock, bonds, investments/business/rental property, etc.:

- Purchase and sale prices and dates (1099-B or 1099 consolidated statement)
- Final year-end broker statement(s)
- Dividends reinvested (stocks only)
- Permanent improvements (property only)
- Depreciation schedule (business & rental property only)
- Cost of sale (broker commissions, package of closing papers received from escrow company, etc.)

If you sold your home:

Bring all closing papers you received from the escrow company when the sale closed plus when you bought your home.

If you paid estimated tax payments:

Amount and date of each payment: bring in your cancelled checks or records of payments made approximately April 15th, June 15th, September 15th and January 15th. The IRS will not send you confirmation, so you will need to keep a record of these payments.