KENNEY TAX & ACCOUNTING, LLC

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WHAT TO BRING TO YOUR TAX APPOINTMENT

PERSONAL INFORMATION FOR EACH FAMILY MEMBER:

- Name
- Date of Birth
- Social Security Card /ITIN/ATIN
- Last 2-3 Year's Tax Return
- Valid Driver's License or other Government issued ID

INCOME AND TAX INFORMATION:

- W-2's
- Interest (1099-INT or substitute)
- Dividend Slips (1099-DIV or substitute)
- Stock Sales (1099-B or Broker Statements)
- Crypto Currency (bitcoin,etc)
- Self-Employment Income and Expenses
- Sale of a Personal Residence
- Rental Income and Expenses
- Sale of any Business Assets
- Gambling or Lottery Winnings
- State Income Tax Refund and State Property Tax Refund
- Pension Income (1099-R)
- Estimated Taxes Paid
- Social Security or Railroad Retirement
- IRA or 401(k) Distribution
- Unemployment Compensation
- 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

TAX CREDITS:

- Child Care Provider/Address and Employer Identification Number (EIN) or Social Security Number (SSN)
- Adoption Expenses and Reimbursements Received
- Retirement Savings Contributions
- K-12 Education Expenses
- 529 College Savings Plan Contributions and Deductions

Make sure you download and fill out the Tax Packet documents on our website at **www.kenneytax.com/client-tax-packet/**