

WHAT TO BRING:

CHECKLIST

- NYS Driver's License for you, and your spouse if filing jointly, or some other form of picture ID. **NO TAX RETURNS CAN BE DONE WITHOUT PROPER ID**
- Social security cards for you, your spouse, and children you are claiming, along with correct birth dates for each
- W-2s from all jobs you held in 2008
- All 1099s that you receive (1099G, 1099Misc, 1099Int)
- If you, your spouse or a child attended college – Tuition Expense Statement (1098T), Student Loan Interest Statement (1098E)
- If you paid for child care – Documentation listing: provider name, address, Tax ID# and amount paid
- Documentation of **Court Ordered Child Support** including SSNs and birthdates.
- Rental information for NYS Credit
- Voided check or savings account statement if you are doing direct deposit.
- Your spouse, if you are married filing jointly
- Any letter or notice that you received from the IRS in 2008
- A copy of 2007 tax return, if available
- Amount of stimulus payment received in 2008
- Homeowners should bring Real Estate Tax paid in 2008

IF YOU PLAN TO ITEMIZE BRING DOCUMENTATION FOR:

- Home interest and property taxes paid
- Medical bills paid
- Charitable contributions made
- Gambling losses (up to the amount of winnings)