



What to Bring Checklist for preparation of your 2007 Income Tax Returns

Please review the following list to help save you time and money before visiting your CPA Tax Store. Bring these items with you so that we can ensure you the largest possible refund.

- Drivers License(s) or other acceptable government issued picture ID
- Social Security cards for taxpayer(s) and all dependents claimed
- Your 2006 federal, state and local income tax returns
- Dependents' dates of birth
- Lancaster County tax return forms if available
- Bank routing and account numbers for direct deposit of refunds
- W-2 forms for all employment wages
- 1099-INT and 1099-DIV Forms issued by banks, brokerage firms and others
- Pension and/or retirement income - Form 1099R
- State and/or local income tax refund amount - Form 1099-G
- Form SSA-1099 Social Security Statements
- Form 1099-G for unemployment compensation received
- Forms 1099-MISC for Self-Employed income
- 1098 Forms for any mortgage interest and mortgage insurance
- Lottery or Gambling Winnings - Form W-2G
- Lottery or Gambling Losses (you should have receipts but we only need totals)
- Income and Expenses from Rentals
- IRA or Self Employed Retirement Plan Contributions amounts
- Alimony paid or received
- Child Care Expenses including provider information (name, address, tax ID Numbers)
- Medical, dental, eyecare, prescription expenses (if able to itemize deductions)
- Cash and non-cash charitable contributions details
- HUD-1 Forms for the purchase or sale of a principal residence
- Real estate and other tax payments
- Sales tax paid on large purchases including automobiles, etc.
- Unreimbursed employment related expenses
- Job related educational expenses
- Expenses for elementary and secondary school teachers
- Forms 1098-T for Tuition and Education Expenses
- Student Loan Interest statement - Form 1098-E
- Amounts and dates of federal, state and local estimated tax payments for 2007