

Wondering what paperwork you need to bring to your tax interview?

Save time and money by going to your tax interview prepared with all the documents you need. Let Jackson Hewitt® help you.

Here is a list for you to reference:

- Wage statements/W-2s
- Self-employment business income and expenses/1099-MISC
- Commissions received/paid
- Pension, retirement income/1099-R
- Unemployment income/1099-G
- Canceled Debt Amount/1099-C
- Social Security income/SSA-1099
- IRA contributions
- Statements on the sales of stocks or bonds/1099-B
- Interest and dividend income/1099-INT/1099-DIV
- Lottery or gambling winnings/losses
- State refund amount/1099-G
- Income and expenses from rentals
- Alimony paid or received
- Record of purchase or sale of residence
- Medical and dental expenses
- Real estate and personal property taxes
- State or local taxes paid
- Estimated taxes or foreign taxes paid
- Cash and non-cash charitable donations
- Mortgage or home equity loan interest paid/1098
- Un-reimbursed employment-related expenses
- Job-related educational expenses
- Educator expenses
- Tuition and Education Fees/1098-T
- Student loan interest/1098-E
- Casualty or theft losses
- Child care expenses and provider information
- Social Security card(s)
- Driver's License(s)
- Dependents' Social Security numbers and dates of birth
- Information concerning your Stimulus payment check
- Last year's Federal and State tax return