



PRODIGY FINANCIAL SERVICES GROUP

What Should You Bring to Your Tax Interview?

PERSONAL INFORMATION FOR EACH FAMILY MEMBER:

- Name
- Date of Birth
- Social Security Card / ITIN / ATIN
- Last Year's Tax Return
- Valid Driver's License

HELPFUL HINT

Bring a copy of your last few years tax returns as well

INCOME AND TAX INFORMATION:

- W-2's
- Interest (1099-INT or substitute)
- Dividend Slips (1099-DIV or substitute)
- Stock Sales (1099-B or Broker Statement)
- 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
- 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, Proof of Health Insurance
- 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)
- Form 1098T from College or University Attended during the tax year
- Dependent Child Birth Certificate; Medical, Daycare, and School Records; Adoption Expenses
- Retirement Savings Contributions



1860 82nd Avenue Suite 201 Vero Beach, FL 32966
Ph: 844-208-7408 Fax: 772-360-4314 www.prodigyfs.com

