Hill's Tax Service
10 Platt Street; Eau Claire, WI 54703 • 715-834-7379

What to bring to your tax appointment

- ☐ 1. New clients bring a copy of your last year's tax return.
- ☐ 2. For all new dependents bring their Social Security card and birthday.

Income:

- ☐ All W-2's.
- ☐ All 1099s including Social Security Income.
- ☐ Sale of property: Date purchased, date sold, how much you paid for it including payment of all major improvements to the property, and sales price. Note for business, farms and rentals property provide date sold and sales price.
- ☐ Business and Rentals bring all income including cash sales & expenses. For actual mileage and standard mileage rate you must have written proof. For home office expenses: Please include all useable space of home and amount of square footage used for office space.
- ☐ If you have any other income, bring it with to see if it is taxable.

Other items needed:

- ☐ Contributions to IRA, HSA's and other retirement accounts. Health insurance premiums paid. Please excluded amounts reported on your W2's or paid by your employer.
- ☐ Medical expenses
- ☐ Property taxes. If you qualify for Homestead Credit make sure you bring your property tax statement for 2012 or your rent certificate. Rent certificates are available on the website or at Hill's Tax Service.
- ☐ Home mortgage interest. 1098's
- ☐ Contributions. Bring receipts for all contributions.
- ☐ Unreimbursed employee business expenses including union dues. This includes all expenses paid by you for your job. You must keep written documentation of miles driven. For home office expenses please include all useable space of home and amount of square footage used for office space.
- ☐ Tuition paid – 1098T plus any books and supplies paid by you for school.
- ☐ Child care paid by you; include name, address and SSN or TIN for provider.
- ☐ Any item that you have a question regarding deductibility.