

## **DOCUMENTS NEEDED FOR TAX ASSISTANCE**

1. Military issued identification for yourself and your spouse
2. Social security cards or individual taxpayer identification notices/cards for you, your spouse, and/or dependents. To find a local Social Security office, [click here](#). [Gene, do you have the link?]
3. A copy of last year's tax return
4. All W-2's received for the 2015 tax year for you and/or your spouse. For military members these are available online through your Defense Finance and Accounting Service MyPay account. Please bring the correct version(s) of your W-2 form. If you are filing both a state and federal return, make sure you print the W-2 versions that say "To be filed with federal return" and "To be filed with state return.")
5. Child care expenses and provider information (name, address, and Employer Identification Number or Social Security Number)
6. Pension, retirement income - IRS Form 1099R
7. Interest and dividend income statements - Form 1099 INT and/or Form 1099 DIV
8. Sales of stock or bonds with cost basis and dates of transactions (preferable to bring financial institution issued tax record(s))
9. Self-employment business income and expenses (the staff is unable to provide assistance to anyone owning a private business) - IRS Form 1099 MISC
10. State refund from previous year
11. Social Security or unemployment income
12. Alimony paid or received with SSN for the other party
13. Information from other income(s)
14. Records of purchase or sale of home
15. Medical and dental expenses not covered by TRICARE or United Concordia
16. Real estate and personal property taxes
17. Cash and non-cash charitable donations (if itemizing deductions)
18. Mortgage or home equity loan interest paid - IRS Form 1098
19. Unreimbursed employment-related expenses
20. Educational expenses - IRS Form 1098E
21. Proof of account for direct deposit of refund - A voided check