

A List of Items to Bring to Zippy

To help save you time and money use the following list as you prepare for your tax interview at Zippy Income Tax.

Call Today to setup your appointment at Zippy Income Tax
(760) 401 – 3017 or fax (760) 693-1599

If available, bring the applicable items from this list to your tax interview, to help us prepare a tax return that results in the largest allowable refund for you.

PERSONAL INFORMATION FOR EACH FAMILY MEMBER:

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

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

A List of Items to Bring to Zippy Tax

- **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**
- **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) or Social Security Number (SSN)**
- **Adoption Expenses**
- **Retirement Savings Contributions**