

Pro Touch Tax & Accounting Services

1624 Decker Blvd. Columbia, SC 29206

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What to bring to your Tax Appointment

Last year's Federal and State tax return, if not a prior-year client

Wage Statements/W-2's	Driver License(s)
Social Security card(s)	Dependents' Social Security numbers and dates of birth
Lottery or gambling winnings/losses	State or local taxes paid
Real estate and personal property taxes	Cash and non-cash charitable contributions
Medical and dental expenses	Record of purchase or sale of residence
Alimony paid or received	Unreimbursed employment related expenses
Job related educational expenses	Educator expenses
Tuition and Education Fees/1098-T	Student loan interest/1098-E
Casualty or theft losses	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-DIV	State refund amount/1099-G
Income and expenses from rentals	Self employment business income and expenses/1099-MISC
Estimated taxes or foreign taxes paid	HUD-1 statement or substitute, if new home purchased
Child care expenses and provider information	
Mortgage or home equity loan interest paid/1098	