

LISA HILL TAX & ACCOUNTING

OFFICE PH: (520) 825-4080

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PERSONAL TAXES DOCUMENT LIST:

BRING WITH YOU:

LAST YEAR'S TAX RETURN. (ONLY IF YOU ARE NEW)

W2'S & 1099'S

INTEREST INCOME

DIVIDEND INCOME

STATE TAX REFUND

CAPITAL GAINS/LOSS

PENSION / IRA

SOCIAL SECURITY INCOME

OTHER INCOME (JURY DUTY, LOTTERY)

MARKETPLACE INSURANCE

CONTRIBUTIONS TO IRA

TUITION PAYMENTS

ESTIMATED TAX PAYMENTS AND DATES PAID

SCHOOL TAX CREDIT

CHILD CARE PROVIDERS ID# AND ADDRESS

DRIVER'S LICENSE OR OTHER PHOTO ID FOR TAXPAYERS

IF YOU THINK YOU MAY BE ABLE TO ITEMIZE, PLEASE BRING THE FOLLOWING

PRESCRIPTIONS

DOCTORS/DENTISTS

HOSPITAL/CLINIC

LAB/XRAY

GLASSES/CONTACTS

LODGING FOR MEDICAL TREATMENT

MEDICAL EQUIPMENT

MEDICAL/DENTAL INSURANCE PREMIUMS

MEDICAL MILEAGE

PRIOR YEAR STATE TAX PAID

VEHICLE LICENSE (TAGS) LISTED SEPARATELY

MORTGAGE INTEREST

REAL ESTATE TAX

CHARITABLE CONTRIBUTIONS LISTED SEPARATELY

CHARITABLE MILEAGE

ELECTRONIC FILING

IF YOU WOULD LIKE TO ELECTRONICALLY FILE AND DIRECT DEPOSIT, BRING A CHECK OR ROUTING & ACCOUNT NUMBERS. IF YOU WOULD LIKE TO USE OUR FEE COLLECT, BRING A PICTURE ID AND YOUR SOCIAL SECURITY CARD OF YOU AND SPOUSE