WHAT TO BRING TO YOUR TAX APPOINTMENT

Please remember your appointment date and time. If you can't make the appointment, please call the tax site (Muskie Center call 248-9567 and Winslow Library call 872-1978) as soon as possible. Please arrive at least 15 minutes before your appointment.

- **Social Security cards** for all persons to be included on the return
- **Photo IDs** for you and your spouse (if filing jointly)
- **Copies of your 2015 Federal and Maine tax returns**
- **The Intake/Interview & Quality Review Sheet** with pages 1 through 3 filled out to the best of your ability
- **Income** information: **All Forms W-2, K-1 and 1099** (which would include wages, retirement income, Social Security, interest, dividends, capital gains, unemployment compensation, disability income, refunds of 2013 state income tax, property tax/rent rebate, etc.), plus information about any income not reported on these forms, such as self-employment, odd jobs, gambling winnings, alimony received, etc. If you sold any property such as stock, bonds, real estate, etc., bring information on your **basis** (what you paid for it, improvements, etc.).
- **Expenses/deductions** – bring all information on anything that may qualify for a deduction or credit, even if you don't plan to itemize deductions
    - **Deductions** – medical expenses, including health insurance premiums and mileage for doctor's visits, etc.; charitable contributions, including mileage for volunteer activities; real estate, vehicle excise and state income taxes **paid in 2016**; mortgage interest; gambling losses; unreimbursed employee expenses; self-employment expenses, including mileage
    - **Adjustments** – Health Savings Account contributions and distributions for medical expenses, IRA contributions, Educator Expenses (if a teacher), Alimony paid, etc.
    - **Credits** – education expenses and student loan interest paid for self, spouse, dependents; child and dependent care expenses (including tax ID#, name and address of care provider) ; home energy improvement expenses (insulation, doors, windows, new roof, new heating system, wood stove); long-term care insurance premiums
- **Estimated federal and state income taxes paid in 2016**, including 4th quarter 2016 estimated tax paid in January 2017 and tax payments sent in with your 2016 returns, plus all 2016 estimated tax payments, including those paid in January 2017, and 2015 tax refunds applied to 2016 taxes
- **Did you have mortgage or credit card debt cancelled?** Bring all **Forms 1099-A and 1099-C** you received for this debt.
- **Anything else that might affect the taxes you owe or the refund you receive.**

Additional information needed for:

Self-employment income: Bring total of self-employment income, including home-based business; some may be reported on **Form 1099 MISC**; other(s) will be you own records.

Self-employment expenses: Total your expenses by category, as much as possible. For vehicle expenses, provide total mileage, business mileage and commuting mileage for the vehicle used in business.

Sale of property: Provide information about the **basis** for the property. For real estate, what you paid for it and the cost of major improvements you made, and the date you bought and sold the real estate. If it is the sale of stocks, bonds or mutual funds and **Form 1099B** does not provide the basis, you need to determine it. If you have not kept records, you should contact your broker to get help determining the basis. If you inherited the property, the basis is usually the fair market value on the date the person from whom you inherited it died. **We can't prepare your return unless we have basis information.**

Retirement income (pensions): Provide the date you started receiving payments, what your age was on that date, and your spouse's age on that date, if it is a joint & survivor annuity.

Maine Property Tax Fairness Credit (replaces Property Tax & Rent Rebate program): Provide the total property tax or rent paid on your primary residence in 2016. If you paid rent, provide the landlord's name and telephone number.

Affordable Care Act ("Obamacare")
If you purchased health insurance through the Marketplace/Exchange, you should receive a Form 1095-A. You must bring that form to your tax appointment. If you were on Medicare, MaineCare, or had employer-provided health insurance for all of 2016, you generally will not receive any additional forms.