**David Picchi CPA, LLC**
50 Nashua Road
Suite 211
Londonderry, NH 03053
(603) 432-3394

# Tax Preparation Tips

**What To Bring To Your Meeting**

- A copy of the Social Security Card for each family member
- A copy of your prior year's tax return
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (miscellaneous, interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S-corporations, trusts, etc.)
- Form(s) 1098 (mortgage interest) and property tax statement.
- Brokerage statements from stock, bond, or other investment transactions including cost basis of securities sold.
- Closing statements pertaining to any real estate transaction (purchase, sale, refinance).
- Small Businesses bring Income & Expense Worksheet
- DMV fees paid (Town Tax Portion).
- Any tax notices received from the IRS or other taxing authorities.

- For non-cash charitable contributions of $250 or more, you must have a receipt from the institution detailing each item and the value. For non-cash contributions of $5,000 or more, you must obtain an appraisal of the item(s) donated.

- Individuals who have changed their name after marriage or divorce must change their name with the Social Security Administration. The IRS matches the Social Security Administration master file for verification of name and social security number. If these do not match, the IRS disallows the deduction for the person being claimed. If you are unsure, take a moment to call the Social Security Administration and verify this information and make changes as necessary.

- Amounts spent on child care for employees' children
- For the child and dependent care credit, bring the total of any non-taxable funds received, including child support and public assistance; percentage of time the qualifying dependent lived in the home of the taxpayer; and telephone number of the care provider.

- Information regarding disaster losses.
- For military personnel, dates in combat zones.