

Williams Business Solutions



Important Documents To Bring To Your Tax Appointment

Below is a list of the important documents you will need to have on hand for your appointment with Williams Business Solutions. This information can be particularly helpful if you are a first-time client. For current and future clients, this guide can be used as a handy reminder to be assured that you have collected all you need to have a complete tax visit.

For the Taxpayer please provide:

- legal name
- social security number
- birth date
- occupation
- address
- county
- school district

For Spouse and/or Dependents* please provide:

- legal name(s)
- social security number(s)
- birth date(s)
- occupation/student/relationship

*Are your children still dependents? Do you have dependents who are not your children?

Not sure, call 979-826-8000. Indicate children's student status or non-children's relationship to the taxpayer.

If you would like your refund directly deposited or a balance due withdrawn, please provide:

- Checking or Savings Account Number **and**
- Routing Number

OR

- Voided check for reference numbers

WHAT HAS CHANGED IN YOUR LIFE?? Did you:

- have a new child
- get married
- have a child go to college
- buy or sell a house
- put money in an IRA
- make energy saving improvements to your house?

All of these will make a difference in your tax return, please make a note and mention them when you come for your appointment.

Please bring all important tax documents that have been mailed to you from banks and employers that show your income and expenses. Some examples are listed below, but there may be others.

Income:

- W-2(s) from Employer(s)
- 1099 Statements from:
 - Banks
 - Investment firms
 - Retirement income
 - Bonus at work

- Commissions at work
- Unemployment
- Social Security
- Alimony received
- Rental income
- Business income
- Farm income
- Hobby income
- Gambling income
- Jury Duty income

Deductions:

- Property taxes
- Mortgage interest
- Charitable gifts
- Charitable miles
- IRA contributions
- Alimony paid to others
- Child care payments
- Student loan interest
- Payments to a medical HSA
- Teacher purchases for classroom
- Moving expenses
- Firefighter's credit
- Business expenses
- Rental property expenses
- Business miles
- Farm expenses
- Medical & dental expenses
- Medical miles