WHAT TO BRING TO YOUR
TAX INTERVIEW

Prudential Vanguard would like for you to take full advantage of your tax interview. You can help us to better serve you by bringing all documents from the following list that pertain to your tax filing:

* Form W-2 (wage statement) from each employer during the year. If you were an employee and have not received a W-2 by January 31st, please contact the employer. If you still do not receive a W-2 by February 15th contact the IRS at 1-800-829-1040 and explain.
* Form W-2G (gambling winnings)
* Form 1099 INT (interest income)
* Form 1099 DIV (dividend income)
* Form 1099 R (retirement income)
* Form 1099 MISC (non-employee compensation, commissions, rent, royalties, prizes, etc.)
* Form 1099 B (brokerage proceeds). Also, bring the purchase date, number of units and basis.
* Form 1099 G (state payments such as tax refunds, unemployment, etc.)
* Form 1099 SSA (Social Security benefits)
* If you were self-employed, bring a <u>written</u> journal of business income and disbursements.
* If you had rental income, bring a <u>written</u> journal of rental income and disbursements.
* Alimony paid or received. If you are the payer you <u>must</u> provide the recipient=s social security number in addition to the amount paid out.
* Social security cards and dates of birth for all dependents claimed (unless already on file)
* Medical and dental expenses, including insurance premiums
* Child care expenses and the provider=s name, tax identification/social security number, address
* Real estate and personal property tax payments
* Following types of interest paid: mortgage, home equity, investment (margin), student loan
* Cash and non-cash charitable contributions (non-cash over $500 must be documented)
* Job-related moving expenses (if the move was greater than 50 miles and not reimbursed)
* Job-related business expenses (such as travel, education, supplies, memberships, uniforms, home office, etc.)
* Qualified tuition or educational training payments
* Record of federal and state, if applicable, estimated tax payments
* IRA/Profit Sharing/SIMPLE/SEP-IRA contributions
* Previous year=s tax return

Of course, any relevant information not listed should also be brought!

Prudential Vanguard

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