

CHECKLIST

General Information:

- Dependent addition or change in current dependents - Required for each additional dependent: Social security card and date of birth
- Changes in address, phone number or email address. Please provide changes here:

- If you were married or divorced during the tax year, please check here. If you have dependents please provide which dependents you will claim on your tax return:

Income

- W-2s from Employers
- Retirement Income - 1099 R
- Social Security Income
- Interest Income 1099 INT
- Dividend Income 1099 DIV
- Unemployment 1099 G
- Stock Sales 1099 S
- Sale of Assets (sale & purchase info required)
- Miscellaneous Income
- Health Savings Account Disbursements

Itemized Deductions

- Medical Insurance
- 1095 A (must have a copy)
- Pharmacy Costs
- Doctors, Dental, Clinics, Hospitals
- Medical Equipment/Supplies
- Medical Miles
- Auto Licenses: Copy of Registrations
- Real Estate Taxes
- Home Mortgage Interest 1098
- Contributions - Receipts required

Information for Credits

- Child Care Expenses
- Education Costs for College Students 1098 T
- Health Savings Account Information

Rebates

- Montana Income Tax Rebate
- Montana Property Tax Rebate

General Deductions

- IRA Contributions
- Student Loan Interest
- Teacher Expenses

You may drop off your tax information in person, use our drop box by the front office door, or use our secure website. No appointment is necessary to drop off your tax information. Our office hours for tax season (January 1st - April 15th) are Monday through Friday, 9am-5pm.