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What to Bring with you to Rex Tax

- Your tax return from last year
- Social Security cards for all persons listed on the tax return
- Dates of birth for all persons listed on the return
- Health insurance cards for yourself and all family members claimed on your tax return for the entire year
- Your driver's license or picture ID
- Wage Statements - W-2's - 1099's
- Pension and retirement income
- Interest and dividend income
- Commissions Self-employed business income and expenses, including car expenses and mileage, and home office expenses. Also, bring in your beginning and ending odometer reading. (miliage logs)
- Lottery or gambling winnings
- Jury duty, prizes and awards
- State and local refund amount
- Social Security income
- Unemployment income
- Rental property income and expenses
- Alimony paid or received
- Real Estate Transaction: Settlement Sheets (buy, sell or refinance)
- Medical expenses : Doctor, dentist, lab, eyeglasses, drugs, insurance premiums, LTC Premiums
- Paid Real Estate Tax Bills - School, County, Borough & Township Tax
- Interest paid on mortgages or business loans
- Charitable contributions receipts and FMV (fair market value) for clothing and household items, including cars and boats
- Work related expenses (Union dues, small tools, safety shoes and glasses, etc.)
- Estimated tax payments, (Original or photocopies of cancelled checks)
- Educational expenses for taxpayer(s) and dependents (Tuition fees, books, equipment and student loan interest).

- Dependent child care information: Include Provider name, address, and social security number or EIN number (employers identification number).
- 529 plan contributions for children's education for PA deduction
- Receipts for purchase of a qualified fuel cell vehicle.
- Brokerage statements for stock sales-(dates bought and sold,-original cost, and sales proceeds).
- Contribution to IRAs (Roth or traditional), SEPs, KEOGHs, SIMPLEs, etc.
- E-file –need bank account and bank routing numbers or voided check.
- Any other pertinent documents or papers.

Seniors:

You may qualify for the Pennsylvania Tax/Rent rebate if your income is between \$35,000-\$36,000. Please bring in your real estate tax bills(School, County, Borough, & Township) and your medicare card or driver's license. All tax bills must be stamped by tax collector with the date paid. If you did not get them stamped you must do so before filing. Call your local tax collector to obtain stamped paid copies prior to your tax appointment. Depending on your income, you may qualify for a \$250 to \$650 rebate