

Rex Tax Service

1 Riverside Drive,
Spring City, PA 19475
610-948-3030

Meeting With Us

-What to Bring to Your Tax Appointment Check List

- 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
- 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. (mileage 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
- Purchase and sale of residence records (include settlement sheets)
- Medical expenses : Doctor, dentist, lab, eyeglasses, drugs, insurance
- Real estate taxes paid and State and Local income taxes
- Interest paid on mortgages or business loans
- Charitable contributions receipts and FMV (fair market value) for clothing and household items
- Work related expenses (union dues, small tools, safety shoes and glasses, etc.)
- Estimated tax payments, bring details
- 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 (employer's identification number).
- 529 plan contributions for children's education for PA deduction
- Receipts for purchase of a qualified fuel cell vehicle.
- Receipts for purchase of energy efficient equipment such as: central air conditioning, heat pump, storm doors, energy qualifying windows, exterior doors and insulation.
- 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.

SENIOR CITIZENS:

You may qualify for the Pennsylvania Tax/Rent rebate if your income is under \$35,000. Please bring in your real estate taxes 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 and the school district to get copies.