



TAX DOCUMENT CHECKLIST

- Your social security card and social security cards for your spouse and children. If you have an Individual Taxpayer Identification Number (ITIN), please bring a copy of the ITIN Notice.
- Forms such as a W-2, 1099, 1042-S or other statements or information reporting income including scholarships, grants, fellowships.
- All 1099 forms showing interest, dividends, capital gains. (Please note: If you had significant investment activity in 2016, you may be referred to a private preparer.)
- Instead of using the 1098-T form, **print and bring with you statements from KU's Enroll & Pay showing tuition and fees paid and aid (including scholarships, grants and loans) received in 2016.** This information may be found by logging into your [KU Enroll & Pay](#) account and clicking on "Campus Finances." Click "Account Inquiry" and click the "Activity" tab. Print all relevant 2016 dates. Under "View by" enter "From" 1/1/2016 "To" 12/31/2016. This will capture all of the tuition paid and show all of the relevant scholarships, grants & loans.
- Information showing total amounts paid for course-related books, supplies and equipment in 2016. Please calculate total amounts of expenses prior to your appointment.
- Copies of your federal and state income tax returns from last year.
- Your checkbook in order to verify your routing number and bank account number for direct deposit of refunds.
- If you plan to itemize deductions, statements showing your medical expenses, home mortgage interest, gifts to charity, real estate and personal property tax, unreimbursed employee expenses etc.
- Your KU identification card.
- If you are an international student or scholar, please bring your passport and your I-20 or DS-2019.
- For tax appointments:* A completed copy of the Intake and Interview Sheet. You must print and complete this form before your tax appointment:
 - [International Students, Faculty and Staff](#)
 - [US Citizens, Permanent Residents and Resident Aliens](#)

Printable Tax Checklist

