

# WHAT IS REQUIRED TO PREPARE YOUR TAXES

The first 2 items **MUST BE VERIFIED** at your 1<sup>st</sup> and 2<sup>nd</sup> appointments. If they are **NOT** verified, we are **NOT** allowed to prepare your taxes.

## **ITEMS TO BRING (Copies are strongly encouraged)**

- \_\_\_\_\_ Photo ID (driver's license or other government issued photo ID) of you and your spouse, if filing jointly
- \_\_\_\_\_ Social Security Cards for EVERY person on your tax return
- \_\_\_\_\_ Birthdates of EVERYONE on your tax return

Common tax documents (you may have others). **Please supply printed documents, not digital records on a phone.**

- \_\_\_\_\_ Previous year Tax Return (check to see what documents were needed then)
- \_\_\_\_\_ Bank routing and account numbers for direct deposit or debit (voided or cancelled check, for example)
- \_\_\_\_\_ PIN Number from IRS, if required
- \_\_\_\_\_ Wage and earning statements from employers, W-2 forms
- \_\_\_\_\_ Retirement Income, Form 1099-R and 1099RR
- \_\_\_\_\_ Social Security Statement, SSA 1099-A
- \_\_\_\_\_ Interest and/or Dividend Income, 1099-INT or 1099-DIV
- \_\_\_\_\_ Non-Employee Compensation, 1099-NEC or 1099-MISC
- \_\_\_\_\_ Unemployment Compensation, 1099G
- \_\_\_\_\_ Royalty income (include the address of the property), 1099-MISC
- \_\_\_\_\_ Gambling Income, W-2 G
- \_\_\_\_\_ Brokerage/Investment statements
- \_\_\_\_\_ Form 1095-A, if insurance was purchased through the Marketplace
- \_\_\_\_\_ Student Loan Interest paid, 1098-E
- \_\_\_\_\_ Student Tuition Statement, 1098-T
- \_\_\_\_\_ Child or Dependent Care provider (name, address, federal employer ID number or Social Security number) and amount paid
- \_\_\_\_\_ Estimated tax payments made
- \_\_\_\_\_ Summary of expenses IF ITEMIZING (medical, taxes paid, gifts to charity, mortgage interest). Expenses should be organized, categorized and totaled).
- \_\_\_\_\_ Power of attorney if applicable.

**IF YOU DO NOT BRING ALL YOUR TAX DOCUMENTS, YOU WILL NEED TO MAKE ANOTHER APPOINTMENT, WHICH WILL BE VERY DIFFICULT THIS YEAR.**

**Remember, you (the taxpayer) are responsible for what is on your tax return.**

**IF YOU ARE NOT COMFORTABLE LEAVING ORIGINAL DOCUMENTS WITH US WHILE WE PREPARE YOUR TAX RETURN, PLEASE MAKE COPIES TO LEAVE WITH US.**