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What do I need to bring to my tax appointment?

The items you will need to bring to your tax appointment varies depending on your personal situation. This checklist is designed to help you find the documents necessary to start the process. If you need additional assistance, please contact our office.

Identification
☐ Current State Issued Driver's License or State Identification Card
☐ Social Security Card
☐ IRS CP01A – Identity Theft Personal Identification Number

Did you have a "life event" such as marriage, divorce, death, or the addition of a dependent?
New Dependent
☐ Name
☐ Date of Birth
☐ Social Security Number
☐ Relationship
☐ Number of Months they lived with you during the current year
☐ Can anyone else claim them as a dependent?
☐ Daycare Expenses

Did you move during the year?
☐ List all addresses that you lived at during the year
☐ Move In / Move Out dates
☐ HUD 1 / Settlement Statement for purchase and sale of residence
☐ Did you sell another personal residence within the last 2 years?

Were you employed, self-employed, or unemployed?
Employment
☐ W-2 (Employee Wages)
☐ 1099-NEC (Non-Employee Compensation – Self Employment)
☐ 1099-G (Unemployment Compensation)

Are you retired and collecting an annuity, pension, IRA, or Social Security benefits?
Retirement
☐ SSA-1099 (Social Security)
☐ 1099- R (IRAs, Pensions, Annuities)
☐ IRA Basis

Are you an investor receiving interest, dividends, capital gain distributions, or royalties?
Investments
☐ 1099-DIV (Dividends)
☐ 1099-INT (Interest)
☐ 1099- B (Brokerage Statement)
☐ 1099-MISC (Royalties / Rent)
☐ Do you have any foreign bank accounts or brokerage accounts?

Did you receive income from a source not listed above?
Other Income
☐ 1099-C (Cancellation of Debt)
☐ 1099-G (Unemployment Compensation / State Tax Refunds)
☐ 1099-MISC (Other Income)
☐ W2G (Gambling Winnings)

Did you purchase your health insurance from the Marketplace? Did you receive a distribution from a Health Savings Account or Long-Term Care benefits?
Health Insurance
☐ 1095-A (Marketplace Insurance)
☐ 1099-SA (Health Savings Account – Distributions)
☐ 5498-SA (Health Savings Account – Contributions)
☐ 1099-LTC (Long Term Care – Distributions)

Did you take at least one course at a college, university, or vocational school?
Education
☐ 1098-E (Student Loan Interest)
☐ 1098-T (Tuition Statement) and Books
☐ 1099-Q (Qualified Education Plan – Distribution)
☐ Bursar's Statement
☐ Scholarships
☐ How many years have you claimed the American Opportunity Education Credit?
☐ Has the student ever had a felony conviction for possession or distribution of a controlled substance?

Would you like your tax refund to be direct deposited into your checking or savings account?
Direct Deposit Information
☐ Voided Check or
☐ Bank's Name
☐ Routing Transit Number
☐ Account Number
☐ Type of Account
☐ Names on Account

***New clients should bring copies of their tax returns for the last two years. ***