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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.

Identification - *REQUIRED*

❍ Current State Issued Driver's License or State Identification Card
❍ Social Security Card – or SSN for everyone listed on your tax return
❍ IRS CP01A – Identity Theft Personal Identification Number

Move Information

❍ List all addresses that you lived at during the year.
❍ Move In / Move Out dates (2024 only)
❍ HUD 1 / Settlement Statement for any sale of real estate

New Dependent

❍ Name
❍ Date of Birth
❍ Social Security Number

Employment & Self-Employment

❍ W-2
❍ 1099-NEC (Non-Employee Compensation – Self Employment)
❍ 1099-K (Payment Card and Third-Party Network Transactions)
❍ 1099-G (Unemployment Compensation)

Retirement

❍ SSA-1099 (Social Security)
❍ 1099-R (Retirement Accounts)

Investments

❍ 1099-DIV (Dividends)
❍ 1099-INT (Interest)
❍ 1099- B (Brokerage Statement)

❍ 1099-MISC (Royalties / Rent)
❍ Cryptocurrency, Digital Assets, Bitcoins
❍ Foreign Bank Accounts or Brokerage Accounts

Other Income

❍ 1099-C (Cancellation of Debt)
❍ W2G (Gambling Winnings, include Loss Statement)

Health Insurance

❍ 1095-A (Marketplace Insurance, Pennie)
❍ 1095-C (Health Coverage)
❍ 1099-SA (Health Savings Account – Distributions)
❍ 5498-SA (Health Savings Account – Contributions)
❍ 1099-LTC (Long Term Care – Distributions)

Education Credit & Student Loan Interest

❍ 1098-E (Student Loan Interest)
❍ 1098-T (Tuition Statement) and Books
❍ 1099-Q (Qualified Education Plan – Distribution)
❍ Bursar's Statement
❍ Scholarships

Energy Credits

❍Home Improvements (Windows, Doors, HVAC, etc.) – Receipts, Energy Star Certificate
❍Solar Energy Improvements -Receipt, Contract, and Form 5695 if supplied by vendor.
❍Electric Vehicles – Bill of Sale, Clean Vehicle Transfer, & Dealership Time of Sale Report.

Direct Deposit Information

❍ Voided Check *or* the following information
❍ Bank's Name
❍ Routing Transit Number
❍ Account Number
❍ Type of Account
❍ Names on Account

New clients should bring copies of their last filed tax return with their source documents.

****All clients should bring copies of any correspondence they received from the IRS, Pennsylvania Department of Revenue, and Pennsylvania Local Taxing Authorities during 2024.***