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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 - REQUIRED

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

Move Information

☐ List all addresses that you lived at during the year
☐ Move In / Move Out dates (2022 only)
☐ HUD 1 / Settlement Statement for purchase and sale of residence
☐ Did you sell another personal residence within the last 2 years?

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

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)
☐ IRA Basis

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)
☐ 1099-G (Unemployment Compensation / State Tax Refunds)
☐ 1099-MISC (Other Income)
☐ W2G (Gambling Winnings)

Health Insurance

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

Education

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

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 tax returns and source documents for the last two years. *- REQUIRED