

What You Need to Bring:

- Government picture ID for taxpayer (and spouse)
- Original Social Security or ITIN cards for all household members *
- If filing jointly, both adults must be present to sign the return
- **Birth dates for you, your spouse, and any dependents on your return.**
- Proof of income, including ALL W2's and 1099 forms (1099-G unemployment, 1099-Misc, 1099-NEC, etc.) any other income not reported on tax documents including alimony, gambling winnings, and tip income, etc.
- Name, address, and tax ID# of childcare provider and amount of money paid
- Self-employment and expenses information Schedule C from prior year helpful
- College expenses, tuition, & scholarships, college loan interest paid (1098-E or 1098-T)
- Educators in K-12 out-of-pocket educational classroom supplies expenses (\$300 per educator max \$600 if both spouses are educators)
- Information on the sale of any stocks, bonds, or mutual funds (generally reported on form 1099-B). Copy of Schedule D if capitol loss carryover from prior year.
- 1099-INT or 1099-DIV documents for interest or dividends
- If itemizing on Schedule A or for State tax purposes: copies of medical expenses, property taxes, mortgage payments, charitable donations documents or category totals. If itemized last year, copy of prior year return schedule A
- If received 1099-G for refund of state/local income taxes and itemized last year
- important tax documents, including 1098T (Tuition, scholarships), 1095A (Health Care)
- Amount of any IRA contributions.
- If you received a first-time homebuyer's credit in a previous year, bring information on the purchase date and the amount of credit you received.
- Information on any foreclosure or other debt forgiveness.
- Receipts for any qualified energy-efficient home items purchased (such as windows, furnaces, insulation, etc.). Certified documents from manufacturer/seller required – lifetime limits apply
- HSA – Health savings account forms 5498-SA, 1099-SA, W-2 with a box 12 Code W & qualified expense totals withdrawals from HSA used to pay.
- Account and routing numbers for direct deposit -voided check preferred
- Copy of last year's tax return for schedule D, C or A returns (Helpful but not required unless asked for) - ask if questions or unsure

The IRS identifies a small number of certain returns that we cannot prepare. They include married filing separately, rentals, bankruptcy, farm income and some self-employment (Schedule C) returns with over \$35,000 in expenses or a loss, among others. Please call or visit our website with any questions about the scope of returns we can do.