



INDIVIDUAL TAX APPOINTMENT CHECKLIST

PERSONAL INFORMATION:

- Form of Identification (license, passport, work permit)
- Social Security Card
- Health Insurance forms for year filing (1095 A, B or C)
- Bank Account Routing & Account # for direct deposit

DEPENDENT INFORMATION:

- Birth Certificate
- Social Security Card
- Health Insurance forms for year filing (1095 A, B or C) OR
- Medical Record for year filing with current address and year OR
- School Report Card for year filing with current address and year

TAX FORMS & SOURCES OF INCOME

- Wages and/or Unemployment = W-2s or 1099-G
- Interest and/or Dividend Income = 1099 Int /1099 Div
- State/Local Income Tax Refund = 1099G
- Social Security or Disability Income
- Pension/Annuity Withdrawals, RMDs = 1099R
- 1120S/Partnership/Trust/ Estate Income = K-1
- Gambling/Lottery Winnings/ Prizes/Bonus = W-2G or 1099M
- Rental Income

TAX FORMS & SOURCES OF INCOME CONT'D...

- Self-Employment Income
- Tips
- Dependent Care Costs
- Education/Tuition Costs/Materials Purchased
- Real Estate/ Property Taxes
- Purchase information for qualifying Solar Residential Energy Credit and/or Electric Vehicle Credit
- IRA Contributions/Retirement Contributions
- A paper copy of your business expenses and /or mileage log if you are self employed



contact us!



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