DOCUMENTS TO BRING TO TAX APPOINTMENT

PRIOR TO COMING MAKE SURE YOU HAVE:

- **Picture ID for the taxpayer (and spouse if applicable)**
- **Social Security cards or ITIN documents** for all taxpayers and dependents
  - Can use Social Security SSA 1099

- **Completed and accurate Intake/Interview & Quality Review Sheet**

- **Copy of the last tax return**

- **INCOME DOCUMENTS** e.g.
  - W-2, SSA-1099, 1099R, 1099-DIV, 1099G, 1099-INT, OTHER 1099 FORMS, Self-employment records,
  - Brokerage statements – sale of stocks or bonds

- **EXPENSE DOCUMENTS** (If your expenses exceed Standard deduction of $12,950 if single and under 65 or $14,700 if 65 or over.)
  - e.g. Mortgage interest, medical/dental expenses, charitable donations, tax documents (sales tax, income tax, property taxes)

- **OTHER TAX DOCUMENTS** e.g.
  - Healthcare – Form 1095A (if you have marketplace insurance)
  - Educational Expenses – e.g. Form 1098-T

- **Checkbook or bankcard with routing number and account number** if you want direct deposit or direct debit.
  - Deposit slips are NOT usually acceptable because they are an internal document for the bank and do not always have the right routing number. We don't know which are and which are not OK to use.)
  - We will not be looking at previous year returns to verify information.
  - **FAILURE TO PROVIDE THIS INFORMATION WILL RESULT IN A MAILED CHECK**

- Any recent IRS correspondence
- **PLEASE REMEMBER YOU ARE RESPONSIBLE FOR THE ACCURACY OF YOUR RETURN. PROVIDING ALL TAX DOCUMENTS IS THE FIRST STEP IN ASSURING THAT!**

PLEASE LEAVE YOUR CHILDREN AT HOME!

PLEASE RE-SCHEDULE IF YOU ARE ILL OR HAVE ANY SIGNS OF COVID OR FLU!