



21833-02-21

What documents do I need for my tax preparation appointment?

THE DAY OF THE SERVICE:

- To file taxes electronically on a married-filing-joint tax return, both spouses must sign the required forms.
- Scanned original of Social Security Cards for taxpayer, spouse if married, and any dependents being claimed.
- ITIN applications and renewals are free when you file a federal tax return.
- Picture ID for taxpayer and spouse (must be a Driver's License, state-issued ID card, or other official documents).
- All W-2's for all places worked in the previous year.
- Voided check or savings account number on a bank document for direct deposit.
- If you received a Premium Tax Credit in the previous year through the Affordable Care Act marketplace (Obamacare), form 1095-A.
- Total amount of Economic Impact (Stimulus) Payment received.

IF APPLICABLE:

- Copies of any 1099's issued.
- Bank account interest year-end statements.
- Student loan interest statement.
- Proof of child care expenses paid (statement from provider with EIN# or Social Security number).
- Statement of post-secondary education tuition expenses paid.
- Social Security year-end statements.
- Any other documents related to taxes.
- Copy of last year's taxes.

IF ITEMIZING:

- Copies of last year's mortgage interest statements.
- Real estate taxes statement.
- Proof of charitable donations.
- Statement of work-related expenses.
- Auto registration and taxes paid in the previous year.