



Please bring the following applicable documents to your appointment.

**Correct, complete documentation is required, or we will be unable to complete your tax return.**

### ITEMS REQUIRED FOR ALL RETURNS:

- ✓ Photo identification for all taxpayers (ex: driver's license, passport, school ID)
- ✓ Social Security cards for all individuals on the tax return, including dependents
- ✓ An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted if you do not have a Social Security number
- ✓ Birth dates for all individuals on the tax return, including dependents
- ✓ A copy of last year's federal and state returns, if available
- ✓ To file married-filing-jointly, both spouses must be present to sign the required forms

### ITEMS REQUIRED BASED ON YOUR SITUATION IN 2020:

Did you...	If YES, bring...
Have a job?	Form W-2 or 1099-MISC for each job
Collect Unemployment?	Form 1099G
Collect Social Security?	Form SSA-1099
Collect Retirement Income?	Form 1099-R
Take money out of a 401K or IRA?	Form 1099-R
Collect interest from a bank account?	Form 1099-INT
Receive dividend payments?	Form 1099-DIV
Pay college expenses, such as tuition?	Form 1098-T and/or receipts for books
Pay student loan interest?	Form 1098-E from the lender(s)
Have any gambling winnings?	Form W-2G
Have health insurance?	Form 1095-A, B or C Health Coverage Statements
Have a child that attends daycare?	Receipts, including providers name, address, and tax ID number
Do you want your refund direct deposited, or any balance due debited from your bank account?	Proof of bank account routing and account numbers, such as a blank check or bank letter

**This list is not all inclusive, more documentation may be required depending on your filing situation. Bring all items that may be needed and relevant.**