

**Items needed are as follows:**

Please **initial** next to each mandatory item that applies specifically to your tax filing needs. Please note that even if you do not have the needed items, it is still required for Tasha's Taxes to work for you, there will be no exceptions made when it comes to providing accurate, non-altered documentations to Tasha's Taxes.

If you need to reschedule your appointment because you need more time to gather your documents, please let the front desk receptionist know and accommodations will be made in accordance with what is available to suit your scheduling needs.

To protect the identity of our clients and to reduce fraud. These are mandatory items no exceptions will be made.

- 1. Unexpired State issued Government ID or driver license as well as Business License, Job Certification Licenses, Specialty License, if you carry work Licensed Work Credentials please provide those as well.
- 2. Social security card/ITIN Paperwork, not just the number but physical proof. Prior year tax return documents as long as the entire social security number or ITIN number is visible in its entirety.
- 3. Bill/ or another item with current address, Proof of Residency i.e., Voter's Registration Card, Permanent Residency Card.
- 4. Bank deposit for refund purposes or payment purposes, I.e., a voided check, or routing number bank account number name of entity
- 5. Birth certificate for DEPENDENTS ONLY
- 6. All W2s, 1099s, self-employment receipts, Unemployment form 1099G, Retirement Income, Social Security Income any form of deductible income that needs reporting
- 7. Any dependents information such IDs, birth certificates, social security card
- 8. Any deductions or receipts that you want to claim. Ie property taxes, mortgage points, real Estate, tithes and offering church documents
- 9. Any education information, name of school, prior school information, certificate education, job training education, as well as form T1098

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- 10. Nonprofit organization all supporting documentation and information, any donations to Charity, Churches or other Meeting/gathering places of worship where you may have paid tithes and offerings. Any Volunteer work you may have done to support community welfare and moral.
- 11. Any required filing forms or required PIN numbers issued to you by the IRS, if you were a victim of identity theft all accompanying information.
- 12. Email address and telephone number
- 13. Paid medical bills, paid dental bills, paid prescription, medical purchases from the pharmacy, ER visit, clinicians, specialist, therapist, counselors, hospital stays, travel stays to hospitals or specialty clinics.
- 14. Vehicle Mileage Log, Gas receipts, Travel expense Log, Toll Roll Payment, Non-Traditional mode of travel for work purposes i.e., trains, planes, Ubers, jets, lifts, etc.
- 15. IRS issues information letters to Advance Child Tax Credit recipients and recipients of the third round of Economic Impact Payments; taxpayers are required to report the information from the letters and forms sent out to them. the IRS will send **Letter 6419**, 2021 advance CTC and **Letter 6475**, Your Third Economic Impact Payment Letter 6475 which only applies to the third round of Economic Impact Payments that was issued starting in March 2021.
- 16. The third round of Economic Impact Payments, including the "plus-up" payments, were advance payments of the 2021 Recovery Rebate Credit that would be claimed on a 2021 tax return. Plus-up payments were additional payments the IRS sent to people who received a third Economic Impact Payment based on a 2019 tax return or information received from SSA, RRB or VA; or to people who may be eligible for a larger amount based on their 2020 tax return.

Privacy Policy - Your Information is Confidential

Protecting the confidentiality and security of current and former Clients' information is of utmost importance. I do not share or disclose any confidential business or confidential tax return information obtained during my practice with any third-party without your explicit written authorization, or as required by law.

Records relating to professional and tax services provided by Tasha's Total Tax service, LLC and are retained according to Federal and State laws. In order to guard your nonpublic personal information, I maintain physical, electronic, and procedural safeguards.

I collect nonpublic personal information about you that is provided to me by you or obtained by me with your authorization.

Client First Name:

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Client Last Name:

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Clients Signature:

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Date:

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TASHA'S TAXES

Spouse First Name:

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Spouse Last Name:

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Spouse Signature:

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Date:

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