What all do I need to bring to my tax appointment?
Tax Preparation Checklist

RAPID TAX SERVICE

Personal Information

☐ A **form of Identification** (and your spouse, if filing a joint return) such as driver's license, state issued ID, etc.

☐ Social Security numbers and dates of birth for you, your spouse, and any dependents you are claiming.

☐ **New Client Only**: A copy of last year's tax return may be helpful but not required

☐ Bank account number and routing number, if depositing your refund directly into your account

☐ **If claiming HEAD OF HOUSE**, a utility bill, property tax bill, copy of lease agreement, or other record showing you are the primary supporter of the household.

Child(ren)'s Information

☐ **Birth certificates** (or confirmation of birth from the hospital) for children you are claiming. Even if you think we have it, bring it just in case.

☐ A copy of each child's social security card – if easily obtainable.

If **any child listed on the return has a different last name** from you (or your spouse), please be prepared to bring:

☐ A copy of the custody agreement showing you are the primary custodian. Only need to provide the front page, page showing custody and last page with signatures.

If there is no custody agreement, then be prepared to bring:

☐ A copy of a recent report card, a school attendance record, daycare receipt, medical record from physician, or health insurance record as long as the child's address matches your residency address.

Income Documents

☐ **W-2** forms for you and your spouse

☐ **1099-MISC** forms for you and your spouse (for any independent contractor work)

☐ **1099-G** forms for unemployment income, or state or local tax refunds

☐ **SSA-1099** for Social Security benefits received

☐ **1099-R**, Form 8606 for payments/distributions from IRAs or retirement plans

☐ **1099-INT, -DIV, -B, or K-1s** for investment or interest income

☐ **1099-S** forms for income from sale of a property

☐ Miscellaneous income: jury duty, gambling winnings, etc.

☐ Business or farming income and expenses

☐ Rental property income and expenses

Adjustments

☐ **Form 1098-E** for student loan interest paid (or loan statements for student loans)

☐ **Form 1098-T** for tuition paid (or receipts/canceled checks for tuition paid for post-high school)

Deductions and credits

☐ Child care costs: provider's name, address, tax ID, and amount paid

☐ Adoption costs: SSN of child; records of legal, medical and transportation costs

☐ **Forms 1098:** Mortgage interest, private mortgage insurance (PMI), and points you paid

☐ Investment interest expenses

☐ Charitable donations: cash amounts, official charity receipts, canceled checks; value of donated

☐ Medical and dental expense records

☐ State and local income taxes paid

☐ Real estate taxes paid

☐ Personal property taxes: vehicle tag fees