

WHAT DOCUMENTS / INFORMATION DO I NEED TO FILE MY TAXES??

- ✓ All Dependent Information (Even if you have filed with us in the past)
 - Full & Correct Names as registered with the S.S. Department
 - Social Security Numbers
 - Dates of Birth
 - Copy of Driver's License for Taxpayer & Spouse (if applicable)
 - Copy of Last Year's Return (if available)
- ✓ All W2s
 - Military
 - Civilian
 - Moving / Travel - Please complete the "**Moving Information Sheet**"
- ✓ Health Insurance Market Place Statement – Form 1095-A (If you have/had insurance through Obamacare)
- ✓ Mortgage Interest Statement – Form 1098 (If you own a home)
- ✓ Real Estate Tax Statement for Taxes Paid (If not listed on the Mortgage Interest Form)
- ✓ School Forms
 - 1098T - -If Attended School
 - 1098E - If Paying Student Loan Interest
- ✓ Childcare Forms for Daycare
- ✓ Investment or Interest Statements
 - Alaska Permanent Fund Dividend (PFD)
- ✓ Donation Statements
- ✓ Do or Did You Own A Business? (Including Uber, Lyft, DoorDash or similar drivers)
 - If so, please complete the "**Business Information Sheet**"
- ✓ Do you have a Rental Home or Rental Property?
 - If so, please complete the "**Rental Information Sheet**"
- ✓ Do you PCS within the last 12 months?
 - If so, please complete the "**Moving Information Sheet**"

ATTENTION: Due to the ever-changing IRS guidelines, we have been forced to limit the complexity of returns we are able to prepare. This includes, but is not limited to, returns requiring Schedule C, Rental Properties, Schedule K-1, and/or Multiple State Filings. Each return is accepted on a case-by-case basis depending on its complexity. Even if we have prepared your taxes in the past containing one of the limitations listed above, we reserve the right to discontinue filing based on complexity. As always, we will do our very best to assist everyone with their tax preparation needs and are committed to filing your taxes properly while maximizing your refund. We love serving those who serve!