Below is a list of items you will need to bring to your appointment. If you are a new client an \* (asterisk) will be by the items for you!

* Driver's License(s)\*
* Social Security card(s)\*
* Dependents' Social Security Card and Birth Certificate \*
* Childcare expenses and provider information
* Wage Statements/W2s
* Letter 6419, 2021 Total Advance Child Tax Credit Payments
* Letter 6475, Your 2021 Economic Impact Payment
* Workers in the Gig Economy Income Statements – Form 1099-K, 1099-MISC, W-2, etc
* Self-employment business income and expenses/1099-MISC/1099-NEC
* Form 1095-A Marketplace Health Insurance
* Form 1099-R Retirement Income
* Form RRB-1099 Railroad Retirement
* Form 1099-G Unemployment income
* Form 1099-C Canceled Debt Amount
* Form SSA-1099 Social Security income
* Form 1099-G State refund amount
* Form 1098 Mortgage or home equity loan interest paid
* Form1099-INT Interest
* Form 1099-DIV Dividend income
* Form 1098-T Tuition & Fees
* Form 1098-E Student loan interest
* Educator expenses ($250 maximum)
* IRA contributions
* Statements on the sales of stocks or bonds/1099-B
* Lottery or gambling winnings/losses
* Income and expenses from Rentals
* Alimony paid or received
* Record of Purchase or Sale of Residence
* Medical and Dental Expenses
* Real estate and Personal Property taxes
* Estimated taxes or foreign taxes paid
* Cash and non-cash charitable donations
* Unreimbursed employment-related expenses
* Casualty or theft losses
* Records of Virtual Currency & other income documents
* Prior Year Federal and State tax return (New Clients Only) \*