
Documentation Request

Taxpayer Name:

Tax Year:

PERSONAL INFORMATION

Government issued photo ID
Social Security card or SSN document
IRS IP PIN (if issued)
Prior year tax return (if available)

WAGES & INCOME

W-2 forms
1099-K
1099-Misc
1099-INT (Interest)
1099-DIV (Dividends)
1099-R (Retirement)
1099-G (Unemployment)
SSA-1099
Other 1099 income forms

DEPENDENTS

Dependent full legal name
Dependent Social Security number
Dependent date of birth
Dependent relationship proof

BANKING INFORMATION

Bank name for direct deposit
Bank routing number
Bank account number

HEALTH INSURANCE

Form 1095-A
Form 1095-B
Form 1095-C

EDUCATION

Form 1098-T
Student loan interest statement

CHILDCARE EXPENSES

Childcare provider name
Childcare provider EIN or SSN
Total childcare expenses paid

HOMEOWNERSHIP

Mortgage interest (Form 1098)
Property tax statement
Home purchase closing disclosure
Home sale closing disclosure

ENERGY CREDITS

Energy efficient improvement
Window replacement receipts
Door replacement receipts
HVAC upgrade receipts