

REQUIRED DOCUMENTS FOR SELF

- Valid ID
- Social Security Card
- W2(s)
- 1098T (College Form)
- 1099-DIV if you received dividends
- 1099-G if you received money or benefits from the government
- 1099-K if you made third-party transactions (through PayPal or Venmo, for example)
- 1099-R for distributions from a retirement plan, IRA, pension, annuity, etc.
- **1099-MISC** if you have paid at least \$600 in medical and healthcare payments, or other income payments.
- **Social Security benefits** – If you receive Social Security, you'll receive an SSA-1099 in January showing the total amount of benefits you received for the year.
- Bank or financial institution statements

REQUIRED DOCUMENTS FOR DEPENDENTS

- Social Security Card(s)
- Birth Certificate
- **Notice 6419** – If you received any [advance payments for the Child Tax Credit](#) in 2021, you should receive this letter in the mail from the IRS in January of 2022. Make sure to have it on hand when you sit down to file as it will show the exact amount you received in advanced payments.

YOU MUST PROVIDE PROOF OF RESIDENCY & GUARDIANSHIP FOR DEPENDENTS

- Current DCBS Letter (SNAP/ MEDICAID LETTER)
 - Current Immunization Record
 - School Registration Form
 - Court Custody Papers
- *** *You only need to provide one of these documents for proof of residency and guardianship*

REQUIRED DOCUMENTS FOR BUSINESS

- EIN/ Social Security
- **Business expense records** – These could be receipts, credit card statements, records of checks you've written, etc.
- **Quarterly estimated tax payment receipts** – If you make installments to your tax bill during the year, the IRS (and your state) should send you a record of what you paid – similar to a receipt.
- **Mileage records** – In order to get a deduction for your travel, you'll need to know how many miles you drove for work purposes.
- **Home office expenses** – Taking the home office deduction? You'll need to know how big your space is in square feet. If you decide to use the actual expense method, you'll also need a record of your home-related expenses, like utilities and mortgage (or rent).