

Data to Bring to Your Meeting with Your Tax Preparer, Not All Forms Will Be Applicable:

- Proof of identification (photo ID)
- Social Security cards for you, your spouse and dependents
- An Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents if you do not have a Social Security number
- Proof of foreign status, if applying for an ITIN
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- Interest and dividend statements from banks (Forms 1099)
- Health Insurance Exemption Certificate, if received
- A copy of last year's federal and state returns, if available
- Proof of bank account routing and account numbers for direct deposit such as a blank check
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Total paid for daycare provider and the daycare provider's tax identifying number such as their Social Security number or business Employer Identification Number
- Forms 1095-A, B and C, Health Coverage Statements
- Form 1098 Mortgage Interest Statements
- 1099-SSA Social Security Statements
- 1099-B Year End Brokerage Statements / Proceeds from Sale of Stocks or Mutual Funds (if applicable, for any stock sales provide cost basis along with purchase dates)
- 1099-C Cancellation of Debt

- 1098-E Student Loan Interest Statement
- HUD-1 Closing Statements for sales or purchases of Real Estate
- 1099-G Unemployment Compensation Received Amounts (must be obtained online)
- 1099-G Prior Years State Tax Refund Amounts (must be obtained online)
- 1098-T Qualified Tuition Paid Statements
- 1099-R Retirement Plan Distribution Statements: Withdrawals, Rollovers or Loan Defaults
- Form 8889 HSA Account Contribution or Distribution amounts
- Form 1099-MISC Small Business / Self-Employed Individuals (Schedule C): Complete books and records
- Daycare/Childcare Expenses and Amounts Paid (Name of provider, Address and Tax ID#)
- Copies of income transcripts from IRS and state, if requested by preparer
- Any other pertinent or applicable documentation