



## Tax Documents Check List

(All items should be sent in **PDF format** or **High Quality Fax**)

1. \_\_\_ Intake Sheet
2. \_\_\_ Permission Letter Signed
3. \_\_\_ Social Security Cards for dependents
4. \_\_\_ Identification Card (military id or driver's license)
5. \_\_\_ All W2's Acquired for 2020
6. \_\_\_ Bank Account & Routing Number (if wanting direct deposit)

**\*The Following Is Additional If Applies to You\***

7. \_\_\_ Education Tax Credit Form 1098-T
8. \_\_\_ House Documents
9. \_\_\_ Unemployment Documents Form 1099-G
10. \_\_\_ Additional Work Documents
11. \_\_\_ Charitable Contributions

**\*Please List Any Additional Documents That Are Sent\***

12. \_\_\_
13. \_\_\_
14. \_\_\_
15. \_\_\_

**\*\*Please return check list so we can account for all documents sent\*\***