



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 Card
4. Identification Card (military id or driver's license)
5. All W2's Acquired for 2025
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
12. Claiming Children Info Needed: SSC, Birth Certificate, School
Or Medical Record with Address, Utility bill, rent receipt or
form 1098 mortgage interest statement.

ADDRESS MUST MATCH TAX RETURN

Please List Any Additional Documents That Are Sent

13.
14.
15.

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