



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***