



## 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 2024
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\***