



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 2023
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***