



DELUXE TAX AND FINANCIAL | WWW.DELUXETAXFINANCE.COM | 817-527-1192

General Information

- ☐ Valid state ID/Passport
- ☐ Social Security Card(s) (Entire Household)
- ☐ Bank Information (For Direct Deposit)
- ☐ Transcript or Copy of Prior Year Return
- ☐ Estimated Tax Payments

Wages, Income, Other

- ☐ W-2s (W-2, W-2G Gamblings, winnings)
- ☐ 1099 (Contractor Income, Retirement, Pension, Dividend And Distributions, Government Payments)
- ☐ SSA-1099 (Social Security)
- ☐ Gross Receipts From Income/Revenue
- ☐ Other

To Maximize Your Refund We Recommend You Include Any Of The Expenses You Incurred That Can Be Filed As A Credit Or Deduction. See The List Below For Several Options.

Deductions/Credits

- ☐ Form 1095A Marketplace Healthcare
- ☐ 1098 - Mortgage Interest (Mortgage interest of \$600 Or More Received By Taxpayer)
- ☐ 1098 - Education (Tuition, Education Interest)
- ☐ Proof of Work Related Expenses
- ☐ Medical/Dental Expenses
- ☐ Health Insurance Payments
- ☐ Childcare Expenses
- ☐ Job Search Expenses
- ☐ Moving Expenses (Work Or Disaster Related)
- ☐ Money Paid for Prior Year Tax Prep
- ☐ Charitable Donations/Church Donations
- ☐ IRA/401k Contributions