

EZ TAX SERVICE

What to Bring to Your Appointment

- IRS letter that states how much Advance Child Tax Credit payments you received in 2021
- IRS letter that states how much money in Economic Impact (Stimulus) payments you received in 2021
- Social Security card(s)
- Driver's License(s) / State Issued ID(s)
- Dependents' Social Security numbers and dates of birth * **Proof of Residency Required**(Day care, medical record, school record with dependents name and tax filer's address dated for the year of 2021.
- Wage statements
- W-2s
- Last year's Federal and State tax return
- Self-employment business income and expenses /1099-NEC*/1099-MISC*/1099-K*
- Commissions received/paid*
- Pension, retirement income/1099-R*
- Unemployment income/1099-G*
- Canceled Debt Amount/1099-C*
- Social Security income/SSA-1099*
- IRA contributions*
- Statements on the sales of stocks or bonds/1099-B *
- Interest and dividend income/1099-INT/1099-DIV*
- Lottery or gambling winnings/losses*
- State refund amount/1099-G*
- Income and expenses from rentals*
- Alimony paid or received*
- Record of purchase or sale of residence*
- Medical and dental expenses*
- Real estate and personal property taxes*
- State or local taxes paid
- Sales tax paid*
- Estimated taxes or foreign taxes paid*
- Cash and non-cash charitable donations*
- Mortgage or home equity loan interest paid/1098*
- Job-related educational expenses*
- Educator expenses*
- Tuition and Education Fees/1098-T*
- Student loan interest/1098-E*
- Moving expenses for member of military*
- Casualty and theft losses related to a qualified disaster
- Child care expenses and the provider's name, address, SSN or EIN the expenses were paid to
- Receipt(s) for qualified energy efficient home improvements*
- Form 1095-A (Health Insurance Marketplace Statement)**
- Form 1095-B/1095-C - Health Coverage Statements from Insurer/Employer

* If Applicable

** If purchased health insurance through the Federal or a State Marketplace.

CONTACT US TODAY TO LEARN MORE!