



# Items to bring to your Tax Appointment

**Bring/mail printed paper copies or original documents. Do NOT bring/mail a USB flash drive.**

## MUST HAVES:

- \*\*\*Proof of the 1st EIP (stimulus)
  - 1444 Form that was sent in the mail OR
  - Screenshot of the deposit in your bank account
- \*\*\*Proof of the 2nd EIP (stimulus):
  - 1444 Form that was sent in the mail OR
  - Screenshot of the deposit in your bank account
- A printed copy of your most recent years tax return.
- Direct Deposit Information - Bank name, routing, and account number (voided check)
- A copy of Taxpayer and spouse driver's license and Social Security Card.
- Copies of child/children's social security cards with birth dates
- Proof of childcare expenses
- Year end statement of Proof of Health Insurance - 1095 A, 1095-B, or 1095-C
- W2 Forms, 1099 Misc Income, 1099 NEC Income
- 1099 R - Pension or Retirement Distributions
- 1099 G - Unemployment
- 1098 Int - Interest Income - anything over .50 cents has to be reported
- Student Loan Information
- Social Security Statements
- Divorce and/or Separation Agreement and/or Custody Decrees or Power of Attorney
- Sales of Stocks or Bonds - buy date and cost basis, sale date, and sale price
- Closing Statements from refinance from home and home bought or sold
- Mortgage interests statements from first and/or second mortgages and home equity loans
- Sales tax paid to treasury office
- Property taxes paid on land and homes
- County portions of anything you put license plates on
- Paid Medical Bills - doctor, dentists, chiro, eye care, RX, medical ins, health ins
- Medical Miles
- Contributions to Non-profit organizations. Please include any charity miles.
- Sales Tax on large purchases - cars, boats, furniture, home improvement, etc.
- Energy Credit receipts - appliances, windows, solar panels, siding, etc.
- Pay stubs - the last one of the year and any other if you have them.