

Items that should be brought to your initial appointment

Drivers License

Social Security Cards

For all listed tax payers and dependants

Birthdates

For all listed tax payers and dependants

Voided Check from the bank account(s) that you wish to have money deposited to
this information must include both routing and account numbers

Taxpayer MUST be listed on the account

Commonly used items

W-2

MTG Interest Statement

W2 G-Gambling winnings

1099 MISC

Property taxes

Statement of donations

1099 DIV

Childcare Statement

Student Loan Interest Statement

1099 INT

Social Security

1095 A- Healthcare Statement

1099 B

1098T-College tuition Statement

Unemployment Statement

1099 R

1099 SA HSA Statement

Estimated Tax Payments

IRA Contributions

Employee Expenses-Please refer to the coordinating sheet