

REQUIRED DOCUMENTS

Personal Identification

- ___ Driver's License
- ___ Social Security Numbers (Social Security Card, Social Security 1099A Statement)
- ___ Bank Routing and Account numbers (from voided check) to support direct deposit

Supporting Process documents

- ___ Form 13614-C Intake/Interview and Quality Review Sheet (completed and signed)
- ___ 2019 Federal and State returns

Common Supporting Tax Documents

- ___ All Form W-2s (from employers)
- ___ All Form 1099-R (from Social Security, Pensions, IRA Distributions)
- ___ All Form 1099-INT (from banks, credit unions)
- ___ All Form 1099-DIV (from brokerage firms)
- ___ Property Tax Statements (from County Tax Office)
- ___ Brokerage Statements containing 1099-DIV, 1099-INT, 1099-OID, 1099-B

Less Common Supporting Tax Documents

- ___ Form 1099 (1099-MISC, 1099-LTC, 1099-S, 1099-NEC, 1099-C, etc)
- ___ Form 1098 (1098-T from schools, 1098-E for student loans, etc.)
- ___ Form 1095A if you have ACA health insurance policy.
- ___ W2-G (gambling winnings)
- ___ Documents to support itemized deductions (medical receipts, charity donations)
- ___ Documents to support business expenses