

REQUIRED DOCUMENTS

FOR ALL TAX APPOINTMENTS

Make sure to bring all required documents on the checklist below that apply to you

- **(Important must have)** Valid Driver's License or Picture I.D
- **(Important must have originals no copies accepted)** Social Security Cards for you, your spouse and dependents
And/or a Social Security verification letter issued by the Social Security Administration
- Individual Taxpayer Identification Number (ITIN) assignment letter for you, your spouse and dependents
- Proof of foreign status, if applying for an ITIN
- **Birth dates for you, your spouse and dependents on the tax return**
- **(Important must have)** Wage and earning statement(s) Form W-2, W-2G, 1099-R, from all employers
- Interest and dividend statements from banks (Forms 1099),(Form 1098-T) for any college tuition/interest paid
- A copy of last year's federal and state returns *if available*
- **Bank routing numbers and account numbers for Direct Deposit**
- **Total paid to daycare provider and the daycare provider's tax identifying number** (the provider's Social Security Number or the provider's business Employer Identification Number)
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms.
- Copy of the settlement statement if claiming the homebuyer's credit
- Record of rent payment, landlord's name and address/mortgage Company statements
- Proof of real estate tax paid for 2015 (Mortgage Statement)