

PAPERWORK CHECKLIST

- 1.) Copy of your Driver's License
- 2.) Copy of another form of ID
- 3.) Need two forms of ID per person on your return (spouse, dependent, etc.)
- 4.) We need proof of residency for any dependent(s) you are claiming.
- 5.) A copy of your return from last year (if new/not here last year)
- 6.) Income Forms (W-2, all 1099's, etc.)
- 7.) 1099-Misc – work expenses
- 8.) If Marketplace members, 1095-A,B, or C.
- 9.) Mortgage Interest
- 10.) Other items possible, but we will contact for them.