Client Paperwork Checklist

Items Needed To Complete Your Return

Identification

- Copy of your Driver's License or State I.D.
- Copy of a 2nd form of ID: Birth Certificate, Social Security Card, or Passport
- Two forms of ID above ***per person*** on your return: Spouse, Dependent, etc.

Documentation

- Proof of Residency for any dependents being claimed for HOH, CTC, ETC, etc.
  - Only acceptable documents are: school records, medical records, government benefits, or a copy of your lease with the dependent's name on it
- A copy of your full return from last year

Paperwork

- **Income Forms:**
  - **This can include, but is not limited to:**
    - W-2
    - 1099
    - Social Security
    - Unemployment
    - Retirement/Pension
    - IRA Withdrawal/Contribution/Rollover
    - Alimony, Disability, Tips
    - Gambling/Lottery
    - Stocks, Investments, etc.
    - Virtual Currency, PayPal, Venmo, Zelle, Etsy, Mercari, Amazon, Digital Assets

- **Additional Forms:**
- 1098-T
- 1098-E
- 529 Savings
- Child Care
- Preschool
- Summer Camp
- 1095A
- Mortgage Statement
- HSa (1099SA/5498SA)
- Cancelled Debt (1099C)

Miscellaneous

- If you had any overtime in the previous year, we will need the last paystub of the year.
- If you purchased or sold a home, we will need the closing disclosure for each.
- If you purchased a vehicle, we will need a copy of the title paperwork.