Items Needed to File Personal Income Taxes

Checklist

- Photo ID - Self & spouse (New Customers Only)
- Current Address
- Current Phone Number -self & spouse
- Email Address – self & spouse
- Social Security Number(s) self – spouse
- Last Years Tax Return Copy (New Customers only)
- Identity Protection PIN – If one has been issued by the IRS
- Copy of Social Security Cards for all dependents
- Date of birth for each dependent
- Name of school for each dependent
- Daycare information and tax ID number (if applicable)
- W2 forms
- 1098T form (for self or dependent enrolled in 4-year degree at any university)
- 1098 Mortgage Interest
- 1099 for any self-employment income
- 1099-G Unemployment Income (If applicable)
- 1099-R Retirement Income (if applicable)
- 1099-INT, 1099-OID, 1099-LTC - Interest Dividend Income (if applicable)
- 1099-SA or 1099-LTC – Health Savings Account and Long-term care reimbursements
- 1099-NEC Self-Employment
- SSA-1099 Social Security Income (if applicable)
- 1099-misc – Royalty Income (if applicable)
- Donation receipts (Goodwill, or other charities
- Donation details and amounts for other charities
- Medical out of pocket expenses paid
- 1095-A Insurance Enrollment through marketplace
- 5498-SA – Showing HSA contributions
- 5498 – IRA Contributions
- Checking or Savings account information for Direct Deposit
- Any other tax related documents or letters that you have received (if applicable)