



WHAT SHOULD I BRING TO DO MY **2024** TAX RETURN?

Use this check list to save time by getting organized before you come in!

YOU	SPOUSE	DEPENDENTS	BASIC INFORMATION
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Social Security Cards or ITIN letters for everyone in the tax return.
<input type="checkbox"/>	<input type="checkbox"/>		Photo ID of the adults
<input type="checkbox"/>			Bank Information for direct deposit (account number + routing number)
<input type="checkbox"/>			A copy of last year's tax return if you have it
YOU	SPOUSE	DEPENDENTS	DOCUMENTS RECEIVED
<input type="checkbox"/>			Letter 6419 – Advanced Child Tax Letter
<input type="checkbox"/>			1099-K –Payment card and third-party network transactions (Uber, Doordash, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2s – Wage and Tax Statements (one for each job you had during the year), including the ones for your dependent children.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Forms 1099s – Non- employee compensation (1099-NEC), Interest Income (1099-INT), Unemployment Compensation (1099-G), Miscellaneous Income (1099-MISC), Dividend Income (1099-DIV) Retirement Plan Distribution (1099-R) & Cancellation of Debt (1099-C).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form(s) 1095-A If you purchase your Health Insurance through the Marketplace.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-T Tuition Statement if someone in your family attended college or university. If your child worked while at College, it would be convenient to bring him or her to maximize your refund.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-E Student Loan Interest Statement if you paid any student loan.
<input type="checkbox"/>	<input type="checkbox"/>		Form 1099-SSA Social Security Benefit Statement
<input type="checkbox"/>			<i>FOR HOMEOWNERS:</i> Form 1098 Mortgage Statement.
<input type="checkbox"/>			<i>FOR HOMEOWNERS:</i> Receipt showing real estate taxes paid.
<input type="checkbox"/>	<input type="checkbox"/>		Form W-2G Certain Gambling Winnings
YOU	SPOUSE	DEPENDENTS	PERSONAL RECORDS
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and dependent care expenses. Receipt should state the amount, name, address, phone number and EIN or SS number of the provider
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Education expenses (books, fees, receipts, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses
<input type="checkbox"/>	<input type="checkbox"/>		Charitable Contributions (bring receipts if amount is larger than \$500)
<input type="checkbox"/>	<input type="checkbox"/>		Retirement Contributions.
<input type="checkbox"/>	<input type="checkbox"/>		<i>FOR HOMEOWNERS:</i> Receipts for approved energy savings improvements to your home.
YOU	SPOUSE	DEPENDENTS	IF YOU ARE SELF-EMPLOYED
<input type="checkbox"/>	<input type="checkbox"/>		Record of business income, including cash.
<input type="checkbox"/>	<input type="checkbox"/>		Record of business expenses must keep receipts
<input type="checkbox"/>	<input type="checkbox"/>		Form 1099-MISC or form 1099-NEC