

## PERSONAL INFORMATION

This information is used to show the IRS and State that you are who you say are. Without this information, your refund may be delayed as the IRS looks into tax fraud.

<input type="checkbox"/>	Identification	<input type="checkbox"/>	Driver's License, State ID Card.	<input type="checkbox"/>	Certificate of Indian Blood (CIB)
<input type="checkbox"/>	Social Security Card or Tax ID Number	<input type="checkbox"/>	Spouse's ID & Social Security Card	<input type="checkbox"/>	Birth Certificate

## DEPENDENT INFORMATION

Just like your personal information, the IRS wants proof of your dependents' identification and wants to make sure you are allowed to claim them as a dependent.

<input type="checkbox"/>	Proof of Date of Birth	<input type="checkbox"/>	Certificate of Indian Blood (CIB)	<input type="checkbox"/>	Income of Adult's in the Household
<input type="checkbox"/>	Social Security Card	<input type="checkbox"/>	Childcare Records	<input type="checkbox"/>	Form 8332 (If Applicable)

## PROOF OF INCOME

Please note that you will not need every item listed below as some may not apply to you. Also note that you may fall into several categories throughout the year, even if it was for a small portion of the tax year. Bring as much of this information as possible.

EMPLOYED					
<input type="checkbox"/>	W2 from each of your Employers				
UNEMPLOYED					
<input type="checkbox"/>	Proof of Unemployment	<input type="checkbox"/>	State Tax Refund (Form 1099-G)		
SELF-EMPLOYED					
<input type="checkbox"/>	Form 1099	<input type="checkbox"/>	Schedule K1	<input type="checkbox"/>	Records of All Expenses
<input type="checkbox"/>	Records of Estimated Tax Payments	<input type="checkbox"/>	Business Asset Use Information	<input type="checkbox"/>	Office in Home Information
RETIRED					
<input type="checkbox"/>	Pension/IRA/Annuity (Form 1099-R)	<input type="checkbox"/>	Social Security Income (Form 1099-R)	<input type="checkbox"/>	Railroad Retirement Benefits (RRB)
RENTAL INCOME					
<input type="checkbox"/>	Records of Rental Income & Expenses	<input type="checkbox"/>	Rental Asset Information	<input type="checkbox"/>	Records of Estimated Tax Payments
SAVING & INVESTMENTS					
<input type="checkbox"/>	Interest & Dividend Income	<input type="checkbox"/>	Income from Sales of Stock/Property	<input type="checkbox"/>	Health Savings Account
<input type="checkbox"/>	Investment Related Expenses	<input type="checkbox"/>	Records of Estimated Tax Payments		
OTHER INCOME/LOSSES					
<input type="checkbox"/>	Gambling Income Records (Form W-2G)	<input type="checkbox"/>	Jury Duty Records	<input type="checkbox"/>	Prizes and/or Awards
<input type="checkbox"/>	Trusts	<input type="checkbox"/>	Royalty Income (1099-Misc)	<input type="checkbox"/>	Record of Alimony Paid

## DEDUCTIONS

We want to help you keep as much of money as you can in your pocket. Help us save you money by bringing in any of these applicable documents. Help us save you money by bringing in any of these applicable documents.

HOME OWNERSHIP					
<input type="checkbox"/>	Form 1098	<input type="checkbox"/>	Mortgage Interest Statements	<input type="checkbox"/>	Real-Estate & Personal Property Tax
<input type="checkbox"/>	Receipts for Energy-Saving Investments				
MEDICAL EXPENSES					
<input type="checkbox"/>	Amounts Paid for Healthcare Insurance	<input type="checkbox"/>	Amounts Paid to Doctors & Hospitals		
CHILDCARE EXPENSES					
<input type="checkbox"/>	Fees Paid to Day/Family Care Center	<input type="checkbox"/>	Wages Paid to Babysitter		
EDUCATION EXPENSES					
<input type="checkbox"/>	1098-T from Education Institutions	<input type="checkbox"/>	Receipts for Education Expenses	<input type="checkbox"/>	Records of any Scholarships
<input type="checkbox"/>	Records of Fellowships	<input type="checkbox"/>	1098-E for Student Loan Interest		
K12 EDUCATOR EXPENSES					
<input type="checkbox"/>	Receipts for Classroom Expenses.				
RETIREMENT AND OTHER SAVINGS					
<input type="checkbox"/>	Interest & Dividend Income	<input type="checkbox"/>	Income from Sales of Stock/Property	<input type="checkbox"/>	Health Savings Account
<input type="checkbox"/>	Investment Related Expenses	<input type="checkbox"/>	Records of Estimated Tax Payments		
OTHER INCOME/LOSSES					
<input type="checkbox"/>	Form 5498-SA (HSA Contributions)	<input type="checkbox"/>	Form 5498 (IRA Contributions)		
CHARITABLE DONATIONS					
<input type="checkbox"/>	Cash Donated to Charity Organizations	<input type="checkbox"/>	Records of Non-Cash Donations	<input type="checkbox"/>	Miles Driven for Charitable Purposes