

Checklist for What to Bring to Appointment

Taxpayer Name: _____

Got?	Item
	REQUIRED: Government Issued IDs for Taxpayer and Spouse (if any) NOTE: if Taxpayer and/or Spouse cannot appear for appointments, complete IRS Form 2848 Power of Attorney for your representative to bring. Form is available on our website with a sample.
	REQUIRED: Social Security Cards – for Taxpayer, Spouse, and all Dependents
	REQUIRED: Intake Form
	2022 Federal and State Tax Return – Very important this year
	Bank Account – blank / voided check
	Form W-2 - Wages / Salary from employment
	Form 1099-G - State Refund or Unemployment
	1099-INT - Interest
	1099-DIV - Dividends
	1099-R - Received by way of a distribution from retirement, IRA, annuity, pension, profit-sharing, insurance contract, or survivor income benefit plan
	RRB-1099-R - Retirement/pension income from railroad retirement
	SSA-1099-R - Pink and white statement from social Security Administration showing benefits received.
	1099-MISC - Reflects income received from royalties, rents, prizes, awards, medical and health care benefit
	1099/NEC - Reflects income received for work performed as an independent contractor or for self-employment.
	Expenses & Mileage related to self-employment: <i>Please use the attached Schedule C Worksheet to summarize these expenses</i>
	1099-K - You may receive this form if you performed for-hire driving services or if you received income through a third-party payment network such as Uber, Lyft, DoorDash, GrubHub, etc.)
	Brokerage statement – includes capital gain/loss information and possibly interest and dividends
	Form 1099-S – Possibly received if you sold a home, residence, or real estate.
	Schedule K-1
	Form W2-G - Gambling winnings – Includes bingo, lottery, casino, etc
	Form 1099-C – Cancellation of Debt

