

Taxpayer Name: _____

Last 4 SSN: _____

| Done | Req'd | |
|----------------|-------|---|
| | X | 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. |
| | X | Social Security Cards – for Taxpayer, Spouse, and all Dependents |
| | | Completed and signed 14446 Form – SCANNING APPOINTMENT ONLY |
| | X | Intake Form – all pages with corrections from interview if any |
| | | 2021 Federal and State Tax Return |
| | | Bank Account – blank / voided check |
| Income: | | |
| | | 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. MUST HAVE AN IN-PERSON APPOINTMENT! |
| | | Form 1099-S – Possibly received if you sold a home, residence, or real estate. |
| | | Schedule K-1 |

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| | | Form W2-G - Gambling winnings – Includes bingo, lottery, casino, etc |
| | | Form 1099-C – Cancellation of Debt |
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| Adjustments, Deductions, Credits | | |
| | | Complete Itemized Deduction & Credits sheet <ul style="list-style-type: none">- Fill out, or correct as needed- Include 2021 OR Return payment of tax due – possible Fed deduction- Include Federal & State Estimated Payment (including refunds carry forwarded from 2021)- Include Political Contributions |
| | | Child & Dependent Care – Please provide the name, address, and EIN of the care provider, as well as the amount you paid and for which child or dependent the care was provided. Include any statement received from the care provider |
| | | Form 1099-Q – Received if you took a distribution from a Qualified Education Program |
| | | Form 1098-T – Received if you or dependents attended an educational institution – <i>Complete the Education Worksheet</i> as well. <i>MUST HAVE AN IN-PERSON APPOINTMENT!</i> |
| | | Form 1095-A – Received if you or dependents had medical insurance through the Marketplace. |
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