

## What To Bring:

### Please bring the following documents for your tax preparation visit:

- Photo Identification (government-issued) for taxpayer and spouse (if applicable)
- If filing jointly, both spouses must be present to sign the tax return and e-file return.
- All income statements: W-2, 1099s, 1099-R, Social Security Benefits SSA-1099, Unemployment 1099-G and other income sources (cash, tips, or other property/services)
- Documentation for all deductions/credits (including charitable contributions), energy, educator expense, student loan interest, etc.)
- Social Security cards and/or ITIN cards for taxpayer, spouse, and all dependents
  - If you need to request a replacement Social Security card or update your Social Security record, please contact your nearest office: [Social Security Office Locator](#)
  - An Individual Identification Number (ITIN) assignment letter can substitute if you do not have a Social Security number (SSN) for the taxpayer, spouse, and all dependents.
- Proof of foreign status, if applying for an ITIN
- Birth dates for taxpayers, spouse, and all dependents.
- CPO1A Notice with your new Identity Protection PIN – Current Tax Year - [Get An IP PIN](#)
- Copy of last year's tax return
- Prior year returns**, copies of IRS ***unmasked*** income transcripts (and state, if applicable)
- Tuition Statement (1098-T) and related expenses from college or technical school
  - **College students:** Please indicate if you are dependent on your parent(s) tax return.
- Statement from Child Care Provider includes total amount paid and tax ID number.
- Health Insurance Coverage Statements: Form 1095-A (Marketplace), B or C
  - **For Help:** Visit [www.healthcare.gov](http://www.healthcare.gov) to access your account or call (800) 318-2596.
- Independent contractor (Schedule C) - Total categorized business expenses
  - **Out of Scope** – Sch C with **loss, depreciation, or business use of home**
  - [IRS GIG Economy Tax Center](#)
  - **Accessing the Uber and Lyft Dashboard Summary:** For a more comprehensive breakdown, visit the website instead of the rideshare app. [Rideshare Tax Organizer](#)
  - **Uber and Lyft** mileage log – mileage you tracked for rideshare and/or delivery services.
- HSA Statement (s) - Form 1099-SA (distributions) and Form 5498-SA (contributions)
- Proof of bank routing and account number (for direct deposit or withdrawal)
- [Earned Income Credit or Other Credit Disallowed - What to Do?](#)
- Claim Certain Credits After Disallowance - [Claim EITC, CTC, ACTC, ODC, AOTC](#) (IRS notice)
- Form 13614-C available at site, if you prefer to complete it in advance, you can access it here: [www.irs.gov/pub/irs-pdf/f13614c.pdf](http://www.irs.gov/pub/irs-pdf/f13614c.pdf)
- Form 13614-NR (nonresident alien) - [www.irs.gov/pub/irs-pdf/f13614nr.pdf](http://www.irs.gov/pub/irs-pdf/f13614nr.pdf)
- Form 8843, IRS Form 8843 - <https://www.irs.gov/pub/irs-pdf/f8843.pdf>
- Also, visit [the FDIC website](#) for information on where to find a bank that can open an account online and how to choose the right account for you. (Source: [www.irs.gov](http://www.irs.gov)).