

Documents for Success!

- Driver's License for every **adult** listed on return (current address if not updated on license)
- Social Security cards and birthdates for **everyone** listed on return
- **Income Information**
 - o W-2s and/or 1099s (1099-K, 1099-MISC, 1099-NEC)
 - o Profit & Loss of Business (EIN if self-employed & applicable)
 - o 1099-G (Unemployment/Government Payments)
 - o 1099-INT, 1099-DIV, 1099-B (Investment Income)
 - o SSA-1099 (Social Security Benefits)
 - o 1099-R (IRA/Pension distribution or withdrawal)
 - o 1099-C (sale of property)
- **Adjustments to Income**
 - o Retirement account contributions
 - o Health Savings Account (HSA)/Medical Savings Account (MSA) Contributions
 - o Student Loan Interest
 - o Self-Employed Health Insurance Premium Payments
 - o Educator Expenses
- **Deductions & Credits**
 - o Medical bills
 - o Charitable donations
 - o Education expenses
 - o Childcare expenses
 - o Mortgage Interest
- **Taxes & Interest Paid**
 - o Real estate taxes
 - o Personal Property taxes (vehicle registration)
- **Lastly...Bank or Direct Deposit Information** 😊