

What to Bring to Your Tax Appointment

To help us prepare your return accurately and efficiently, please bring the documents that apply to you. If you are unsure whether something is needed, bring it with you or upload it to your secure portal.

Basic information

- Photo ID for you and your spouse, if filing jointly
- Social Security cards or ITIN letters for you, your spouse, and dependents
- Dates of birth for everyone
- Last year's tax return, if we did not prepare it
- IRS or state tax notices received during the year
- Bank routing and account number for direct deposit or payment
- Current address, phone number, and email address

Residency, dependents, and credit proof

Bring only the records that apply to your return.

Dependent residency

- School, medical, daycare, or social service records showing the dependent's name, address, and dates.
- Official letter on letterhead from a school, medical provider, social service agency, or place of worship showing names, shared address, and dates.

Relationship and custody

- Birth certificates, adoption records, placement agency letters, or court documents showing your relationship to the dependent.
- Custody order, divorce decree, separation agreement, Form 8332, or other release document if parents are divorced, separated, or living apart.

Head of Household

- Rent, mortgage, property tax, utility, repair, insurance, and household expense records.
- Proof you paid more than half the cost of keeping up the home for the year.

Support for dependents or qualifying relatives

- Child support agency statements or government benefit statements.
- Housing, utility, repair, daycare, school, medical, clothing, or other support records with receipts or payment confirmations.
- Proof a non-relative dependent lived in your home for the entire year, if applicable.

Credits and special forms

- Education credit proof: Form 1098-T, school statements, and receipts for qualified tuition, fees, books, supplies, and required equipment.
- Child and dependent care proof: provider name, address, tax ID or Social Security number, and total amount paid.
- Marketplace health insurance proof: Form 1095-A, if anyone in the household had Marketplace coverage.

IRS security and prior notices

- IRS Identity Protection PIN letter or online IP PIN, if the IRS issued one to you, your spouse, or a dependent.
- Any IRS notice showing a credit was previously disallowed or reduced, and any Form 8862 information if recertification may be required.

Income documents

- W-2 forms from all employers
- 1099-NEC or 1099-K forms for self-employment or contract work
- 1099-INT, 1099-DIV, and brokerage statements for interest, dividends, and investments
- 1099-R forms for retirement, pension, or IRA distributions
- SSA-1099 for Social Security benefits
- Unemployment income statements
- Rental income records
- Partnership, S corporation, trust, or estate K-1 forms
- Records of any cash, app, or online payment income not shown on a tax form
- Cryptocurrency or digital asset transaction reports, if applicable

Deductions and credits

- Mortgage interest statement, Form 1098
- Property tax records
- Charitable donation receipts, including cash and non-cash donations
- Medical and dental expense totals
- Childcare provider name, address, tax ID, and amount paid
- Education forms, including 1098-T and student loan interest statements
- Energy-efficient home improvement receipts, if applicable
- Retirement contribution records
- Health Savings Account forms, including 1099-SA and 5498-SA
- Electric vehicle purchase documents, if applicable

Self-employed or business owners

- Business income summary
- Business expense records by category
- Mileage log and vehicle expense records
- Home office expense details, if applicable
- Business asset purchases or sales
- Estimated tax payments made during the year
- 1099 forms received or issued
- Payroll records, if you have employees

Rental property owners

- Rental income received
- Mortgage interest, property tax, and insurance records
- Repairs, maintenance, utilities, HOA fees, and management fees
- Purchase or sale closing statements
- Depreciation records from prior tax returns

- Days rented and days used personally, if applicable

Life changes to tell us about

- Marriage, divorce, separation, or death of a spouse
- Birth, adoption, or custody changes for dependents
- New job, retirement, or unemployment
- Purchase, sale, or refinance of a home
- Move to a new state
- Start or closure of a business
- Sale of investments, property, or digital assets
- Health insurance changes

Before your appointment

- Gather all tax forms before your meeting whenever possible
- Upload documents to your secure portal or bring copies with you
- Make a list of questions you want to discuss
- Let us know about major changes even if you do not have a form for them

Reminder

Please do not email documents that contain Social Security numbers, bank information, or other sensitive personal details unless we have specifically provided a secure email method.