

Required Documents for Tax Prep



In order to have your taxes prepared you **MUST** bring the following documents that apply:

- **Proof of identification** (photo ID, driver license, state-issued ID, passport, military ID, tribal ID)
- **Social Security cards** or Individual Tax Identification Number (ITIN) for yourself, your spouse and your dependents or anyone else on your return
- **Birth dates** for you, your spouse, and dependents on the tax return
- **Wage and earning statements** (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- **Interest and dividend statements** from banks (Forms 1099)
- **Health Insurance Exemption Certificate**, if received
- **Proof of bank account routing and account numbers for direct deposit such as a blank check**
- Married filing joint: **both spouses must be present** with proper documentation to complete a tax return
- **Total paid for day-care provider and the day-care provider's tax identifying number** such as their Social Security number or business Employer Identification Number
- **Forms 1095-A, B and C, Health Coverage Statements.**
- **A copy of last year's federal and state returns, if available, and all other tax-related documents**