

PLEASE BRING WITH YOU THE FOLLOWING ITEMS THAT APPLY

1. A valid ID for you and your spouse.
2. ORIGINAL SOCIAL SECURITY CARDS OR INDIVIDUAL TAX-PAYER IDENTIFICATION NUMBERS **FOR ALL FAMILY MEMBERS.**
3. A copy of last year's federal and state tax returns.
4. All W-2 Forms.
5. All 1099 forms (unemployment benefits, Social Security income, etc...)
6. If you had health insurance through the Marketplace (Exchange) and received a premium subsidy, you must bring the 1095-A form. Only people on the tax return can be listed as recipients of the subsidy on the 1095-A.
7. Mortgage interest and real estate taxes paid statement.
8. Medical expenses paid and health insurance premiums paid.
9. Charitable contributions.
10. Day care expenses statement.
11. Form 1098T and all college student account statements and cost of books, and student loan statements.
12. If direct deposit of return amount is desired, bring a blank check.

If you are married and filing jointly, both spouses need to be present.

If you or your dependent is not eligible to receive a Social Security Number, you may need to apply for an Individual Taxpayer Identification number (ITIN). The ITIN can be requested by completing IRS Form W-7, available at the IRS website: www.IRS.gov.