

TAX PREPARATION CHECKLIST:

Please bring **ALL** of the following items to your tax preparation appointment:

- Proof of identity: Picture ID for all adults filing a return
- Social Security cards of everyone listed on the tax return
- Birth dates for all persons listed on the tax return
- ALL** wage & earning statements (such as W-2, W-2G, 1099R) from all employers that may be associated with any income received by you or your household
- If applicable, amounts paid for daycare and the child care provider's identification number
- If available, a copy of your previous year's federal and state tax returns
- A voided check or savings deposit slip to have your refund directly deposited into your bank account

*If filing a joint return, both you and your spouse need to be present to sign the return.