



## What to Upload in the Client Portal or Bring to Your Appointment!

IRS requires tax preparers to ask many questions to confirm clients meet requirements for credits & deductions. Tax forms & support doc copies are required to show eligibility to claim credits and business expense deductions.

**Help Us – Help You** by providing all IRS required documents to prove your eligibility, so you can,

**GET THE REFUND YOU DESERVE!**

- Social Security card(s)
- Driver's License(s) / State Issued ID(s)
- Dependents' Social Security numbers and dates of birth\*
- Wage statements
- W-2s
- Last year's Federal and State tax return
- Self-employment business income and expenses /1099-NEC\*/1099-MISC\*/1099-K\*
- Commissions received/paid\*
- Payment Card and Third Party Network Transactions/1099-K (Related to rents received or any other transaction not related to a Self-employed business)\*
- Pension, retirement income/1099-R\*
- Unemployment income/1099-G\*
- Canceled Debt Amount/1099-C\*
- Social Security income/SSA-1099\*
- IRA contributions\*
- Statements on the sales of stocks or bonds/1099-B \*
- Interest and dividend income/1099-INT/1099-DIV\*
- Lottery or gambling winnings/losses\*
- State refund amount/1099-G\*
- Income and expenses from rentals\*
- Alimony paid or received\*
- Record of purchase or sale of residence\*
- Medical and dental expenses\*
- Real estate and personal property taxes\*
- State or local taxes paid
- Sales tax paid\*
- Estimated taxes or foreign taxes paid\*
- Cash and non-cash charitable donations\*
- Mortgage or home equity loan interest paid/1098\*
- Job-related educational expenses\*
- Educator expenses\*
- Tuition and Education Fees/1098-T\*
- Student loan interest/1098-E\*
- Moving expenses for member of military\*
- Casualty and theft losses related to a qualified disaster
- Child care expenses and the provider's name, address, SSN or EIN the expenses were paid to
- Receipt(s) for costs of residential solar, wind, geothermal, heat pumps, and biomass fuel property as well as qualified windows & doors that qualify for the Energy Efficient Home Credit\*
- Form 1095-A (Health Insurance Marketplace Statement)\*\* \*
- Form 1095-B/1095-C - Health Coverage Statements from Insurer/Employer

\* If Applicable

\*\* If purchased health insurance through the Federal or a State Marketplace.