

## WHAT TAX DOCUMENTS WILL I NEED FOR MY APPOINTMENT?

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1. **Social Security Cards:** (new clients only) including for spouse and dependents
2. **Driver's License or Picture ID:** including spouse, as we CANNOT e-file without this!
3. **Prior Year's Tax Return** (new clients only)
4. **A Check:** So, we can set up direct deposit of your refund(s).
5. **All Income Documents:** W-2's, 1099's, Schedule K-1's, Self-Employed Business Income and Expenses (financial statements or on a spreadsheet), Social Security or Unemployment income
6. **Did you receive Unemployment Income during 2024?** We'll need the 1099-G that was mailed to you in early January, or log into online account and print your 1099-G.
7. **Did you take an early withdrawal from a retirement account during 2024?** We'll need the form 1099-R that was mailed to you, or you can download it from your retirement online account.
8. **Do you own any form of Virtual Currency?** If you sold any virtual currency, please bring the amount sold, proceeds received and your cost basis.
9. **Do you have an Identity Protection Pin set-up with the IRS?** Please provide the letter they mailed you with the six-digit pin. Click this link for IRS details on how to retrieve your Identity Pin: <https://www.irs.gov/identity-theft-fraud-scams/retrieve-your-ip-pin> as we CANNOT e-file without this!
10. **Expenses and Contributions:** Child-Care or after-school care, Medical & Dental Expenses, Mortgage Interest (1098), Property Taxes Paid in 2024, Charitable Contributions, Interest on Student loans (1098-E), Qualified Education Expenses (1098-T), etc.
11. **Health Insurance Coverage:** Include form 1095-A from the Health Insurance Market Place (if applicable)
12. **Health Savings Account (HSA):** Did you contribute or use your HSA during 2024? If so, we will need the form 1099-SA and form 5498-SA that was mailed to you, or you can download it from your HSA online account (call the number on the back of your HSA card for more info).

## IF YOU OWN A HOME OR MADE A LARGE PURCHASE

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- If you have bought, sold, or refinanced a home in 2024, we will need to see your **closing cost and settlement statement** (HUD Statement).
- Bring receipts of any **Energy Efficiency Improvements** made to your home in 2024 such as: insulation, windows, fence, air-conditioner, refrigerator, oven, etc.
- Did you purchase any **large items** such as a: car, motorcycle, boat, RV? If so, please bring the sales receipt for additional sales tax information.