

Personal Information

- Photo ID
- Social Security Cards for all persons listed on the tax return
- Birthdate for all persons listed on the tax return
- Direct Deposit information if using- voided check or routing and account number
- **NOTE:** To file electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms

Income & Public Benefit Statements

- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers
- Interest and dividend statements from banks (Forms 1099)
- Year-end income for MFIP, SS, SSI, MSA, GA, Veterans benefits, workers compensation

Health Insurance

- All Forms 1095, Health Insurance Statements for each person listed on tax return

Education & Child Care Credits

- Record/receipts of educational expenses for children in grades K-12 (including school supplies, tutoring, art classes)
- Tuition expenses for university, college, or technical school (1098-T)
- Interest Statement for student loans (1098-E)
- Child care expenses: Provider name, address, and Tax ID or Social Security Number

Property Taxes

- Homeowners: Statement of Property Tax Payable in 2018. Mailed by county in March
- Renters: 2017 Certificate of Rent Paid (CRP)
- Mobile home owners: 2017 Certificate of Rent Paid (CRP) and Property Tax Statement payable in 2018. Mailed by county in June

Additional Documents

- Previous year's tax return if available
- Record of charitable donations