

What do I need to have my taxes done?

Required Identification

- ☐ A government-issued photo ID
- ☐ Original Social Security Card(s) or Individual Tax Identification Number(s) for all individuals listed on the tax return
- ☐ Birthdates for all individuals listed on the tax return

Direct Deposit

- ☐ Direct deposit information: voided check or checking/saving routing and account number

Income

- ☐ Income statements or W2s for each job
- ☐ All 1099 forms received (if any)
- ☐ Year-end income for MFIP, SSI, MSA, GA, veterans' benefits, worker's compensation (if any)

Credits

- ☐ Education expenses for children in grades K-12 (pens, notebooks, tutoring, music classes, costs of instruments)
- ☐ Tuition expenses for university, college, or technical college (Form 1098-T)
- ☐ Interest statement for student loans (Form 1098-E)
- ☐ Childcare expenses: amount paid, provider name, address, tax ID or Social Security number

Deductions

- ☐ Documentation of charitable donations to qualified [501(c)(3)] nonprofit organizations
- ☐ Homeowner statements (Form 1098): mortgage insurance/interest and real estate taxes paid
- ☐ Out of pocket unreimbursed medical expenses

Health Care

- ☐ Forms 1095-A, B or C, Affordable Health Care Statements
- ☐ Exemption certificate from the Marketplace, if applicable

Property Tax Refund

- ☐ Certificate of Rent Paid (CRP)
- ☐ Statement of Property Taxes Payable in 2025

Other

- ☐ A copy of last year's tax return
- ☐ IRS Letter 6419, Advanced Child Tax Credit
- ☐ IRS Letter 6475, Third Economic Impact Payment and Plus-up Payments