TAX PREPARATION: DOCUMENTS YOU WILL NEED

Federal Photo IDs (If filing jointly, both spouses must be present WITH ID)
Social Security cards and correct birthdates for all family members
W-2 forms for all jobs worked during the current tax year
All 1098 forms (for mortgage, higher education expenses, etc.)
All 1099 & other income forms
Amount of any income not reported on a statement
Records of deductible/qualified expenses not shown on a statement
A voided check and/or savings account number for direct deposit (encouraged)
Childcare provider info (name, address, tax ID/social security number)
Last year’s federal income tax return

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