



## **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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