



## What You Need to File

- ✓ Driver's License(s)
- ✓ Social Security card(s)
- ✓ Dependent(s) Social Security cards and or birth certificates
- ✓ All 2022 W2 forms
- ✓ 2021 Tax Return (**new clients**)
- ✓ Child care expenses and provider-**Amount paid, providers name, address, EIN or social**
- ✓ Proof of head of household status-**Utility Bill Year 2022**
- ✓ Tuition and Education Fees/**1098-T** & proof of school expenses
- ✓ Student loan interest/**1098-E**
- ✓ Self-employment **Business Expenses and or 1099-NEC- Bank statements, receipts etc.**
- ✓ Social Security income **SSA-1099**
- ✓ Marketplace health insurance **1095-A**
- ✓ Pension, IRA contributions and retirement income **1099-R**
- ✓ Unemployment income **1099-G**
- ✓ Car Tags Registration 2022
- ✓ Educator expenses
- ✓ Medical and dental expenses from 2022
- ✓ Mortgage or home equity loan interest paid-**1098**
- ✓ Statements on the sales of stocks or bonds-**1099-B**
- ✓ Interest and dividend income-**1099-INT/1099-DIV**
- ✓ Lottery or gambling winnings-**Form W-2G**
- ✓ Canceled Debt Amount-**1099-C**
- ✓ Income and expenses from rentals
- ✓ Alimony paid or received
- ✓ Real estate and personal property taxes
- ✓ Cash and non-cash charitable donations