

General Information

- Personal information for you (and your spouse)
 - Full legal name
 - Date of birth
 - Tax ID number (SSN, ITIN, or ATIN)
 - Identity Protection PIN (IP PIN) (if applicable)
- Bank account and routing number (for direct deposit or direct pay)
- Personal Documents (for new clients)
 - Prior year tax return
 - Driver's License
 - Social Security Card

Dependent Information

- Dependent information
 - Full legal name
 - Date of birth
 - Tax ID number (SSN, ITIN, or ATIN)
 - Relationship to you (son, daughter, etc.)
 - Months lived in your home during the tax year
- Childcare information (required for each provider):
 - Provider's Name
 - Provider's SSN/EIN
 - Provider's Address
 - Amount paid to provider for each child

Sources of Income

Note: This only includes common income items. Please check if you have additional income not listed.

- Form W-2: Wage and Tax
- SSA-1099: Social Security
- 1099-R: Pension/IRA/Annuity
- 1099-DIV: Dividends and Distributions
- 1099-INT: Interest Income
- 1099-G: Unemployment
- 1099-NEC: Nonemployee Compensation
- 1099-MISC: Miscellaneous Income
- 1099-K: Third Party Network Transactions
- 1099-SA: Distribution from an HSA
- K-1: Partner's Share of Income
- 1099-B: Sale of Stock
- Self-Employment, Rental or Farm Income

Common Credit and Deduction Items

- 1095-A: Marketplace Health Insurance
- 1098-T: Tuition Statement
- 1098-E: Student Loan Interest
- K-12 Educator Expenses
- Charitable Contributions
- Medical & Dental Expenses
- Mortgage Statements
- State & Local Taxes
- Electric Vehicle Purchases
- Energy Saving Home Improvements

Contributions and Payments

- IRA/Roth Contributions: \$ _____
- Estimated Federal Tax Payments (1040-ES):
Q1: \$ _____ Q2: \$ _____ Q3: \$ _____ Q4: \$ _____