



WHAT TO BRING TO FILE MY TAX?



This is a basic guide, remember that each tax is unique and different and you may only need some of the documents on the list.

COPIES OF PREVIOUS TAXES

If you are a new client, please bring a copy of your last tax return, we will review it for FREE to see if any amendments are necessary to help you receive a better refund.

PERSONAL AND DEPENDENT INFORMATION

- Photo identification (passport, ID, license, work permit or others).
- Social Security or ITIN / TAX ID of all those being claimed
- Payments for child care with information on who performs the service.
- Any invoices / Service Bill (Electricity, Water, Gas, etc.) for head of household qualifications

INFORMATION ABOUT YOUR INCOME

- All work forms received (W2's, 1099-NEC, 1099-MISC or others)
- If you do not receive forms and declare Cash, you must support your declaration with Bank Statements, Copies of Cashed Checks or receipts of payments received.
- Commissions received/paid.
- Retirement pension /1099-R
- Debt cancellation/ 1099-C
- Social Security Benefits Statement/ SSA-1099
- Statements for sale of stocks/ 1099-B/ROBINHOOD/WEBULL, etc
- Interest and Dividends/ 1099-INT / 1099-DIV
- Stimulus check information

ADJUSTMENTS TO YOUR INCOME

- Forms received for education /Tuition Statements 1098-T
- Interest paid for student loans / Student Loan Interest Paid 1098-E
- IRA contributions
- MSA Contributions
- Donations made
- Totals of expenses if you declare only cash income and/or are an independent contractor

HEALTH INSURANCE

- Form 1095-A (Health Coverage Marketplace Statement)



District
MULTISERVICES ★★★