

You must arrive 30 minutes prior to appointment time. If you are late, your appointment might be cancelled.

In order to complete an accurate tax return the taxpayer needs to bring:

1. A completed IRS Intake/Interview quality review sheet
 - IRS Form 13614-C, Intake/Interview and Quality Review sheet
 - Answer the questions about the taxpayer and their family
 - Birthdates for the taxpayer, spouse, and dependents
 - Health insurance coverage for all members, IRS Form 1095-A, 1095-B, and 1095-C
2. Original or photocopy of the social security cards for everyone listed on the tax return
3. Photo ID for the taxpayer and spouse (if applicable)
4. Copy of last year's Federal and State tax returns
5. Wage and earning statements like Forms W-2, W-2G, 1099-R and other 1099s
6. Any other relevant information about income and expenses
7. Bank account information such as routing and account numbers for direct deposit
8. Day care receipt with the total amount paid and the day care provider's:
 - Name, Address, and phone number
 - Tax Identification or SSN
9. The following itemized items for taxpayers who itemize:
 - Mortgage interest statement (normally in December or January bill or 1098)
 - Real Estate tax documents
 - Vehicle Registration from DMV
 - Charitable contributions with receipts or documentation to substantiate
 - Student loan interest documents
 - Any other itemized deductions
10. Year-end Brokerage statement
11. Rental property income and expenses,