

## What to Bring to Your Tax Appointment:

**Remember:** if you are married, your husband or wife must come to your tax appointment with you.

### Documents to Bring:

- Photo ID for you and your husband or wife
- Social security cards for you, your husband or wife, and your dependents (children)
  - An ITIN letter can be used for you, your spouse, and your dependents if you do not have a Social Security number.
- SSA-1099 form (Social Security Benefits Statement)
- All income statements (W-2 and 1099 forms) for you and your husband or wife
- A copy of last year's federal and state returns, if available
- Health Insurance Exemption Certificate, if received
- Forms 1095-A,B and C – Health Coverage Statements

### Information to Bring:

- Birthdates for you, your husband or wife, and your dependents (children)
- Information for any other sources of income

Optional:

- Bank account number and routing number (for direct deposit of any refund)

### If you have a childcare provider, bring the following:

- Total paid for childcare
  - W-10 filled out by the provider
- Or
- A statement from the provider that includes the child's name and the provider's EIN/SSN and address.

### If anyone attended college or technical school, bring the following:

- 1098-T form (Tuition Statement) from the institution
- A student transcript of fees paid
- Any additional receipts for books or other non-tuition expenses