

Today's Date: \_\_\_\_\_

Deliver Option:      Mail  
Pick-up Oshkosh  
Pick-up Berlin

Taxpayer	Spouse
Name: _____	_____
SSN: _____	_____
DOB: _____	_____
Email: _____	_____
Phone #: _____	_____

**Dependents:**

Name	DOB	SSN	Relationship
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Important!!! Stimulus Payment 3: \$\_\_\_\_\_**

If you did not receive this payment, please write NO in the box

Do you own or rent? \_\_\_\_\_

If homeowner: **Forms 1098:** Mortgage interest, private mortgage insurance (PMI), and points you paid  
Investment interest expenses and **property taxes**

If Renting and make less than **\$24680** need a completed Rent certificate

**Affordable Care Act**

If you have insurance through the exchange (Obama Care) make sure you have your 1095-A with you for your tax appointment. I am unable to complete your return without this information.

## Basic Information

- Double check to ensure we have copies of driver licenses, SSN cards, and voided check
- Social Security numbers and dates of birth for you, your spouse, your dependents
- Copies of last year's tax return for you and your spouse (for new customers only)
- Bank account number and routing number, if depositing your refund directly into your account

## Information about your income

- W-2 forms for you and your spouse
- 1099-C forms for cancellation of debt
- 1099-G forms for **unemployment income** or state or local tax refunds
- 1099-MISC forms for you and your spouse (for any independent contractor work)
- 1099-NEC forms for you and your spouse (Non-employee compensation)
- 1099-R, Form 8606 for payments/distributions from IRAs or retirement plans
- 1099-S forms for income from sale of a property
- 1099-INT, -DIV, -B, or K-1s for investment or interest income
- SSA-1099 for Social Security benefits received
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.

## Adjustments to your income

- Form 1098-E for student loan interest paid (or loan statements for student loans)
- Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-high school)
- For teachers: Canceled checks or receipts for expenses paid for classroom supplies, etc.
- Records of IRA/Roth contributions made during the year
- Records of Health/Medical Savings Account (HSA)(MSA) contributions

## Child Care

- Child care costs: provider's name, address, tax ID, and amount paid

## Extra Information (Super Important!!!)

- Verification of Stimulus amounts received**
- Advanced Child Care Payment received**