

Required documents to complete your tax return

Go through this document and place a check mark next to each line that applies to you and make sure you have the supporting documents listed in parenthesis. If you do not have the required documents with you at this time, we cannot complete your tax return.

Mandatory to file

- _____ Military ID Card(s)
- _____ Social Security Card(s) or 2008 Tax Return (family members)
- _____ Power of Attorney (for filing someone else's return)
- _____ W-2 Forms
- _____ Voided check or bank card with routing number (for E-filing)

Types of Income

- _____ Earned Interest on a bank account (1099-INT)
- _____ Earned Ordinary Dividends (1099-DIV)
- _____ Itemized your deductions last year (State Tax Return from 2008)
- _____ Received alimony
- _____ Owned your own business (documents showing profits and expenses)
- _____ Received IRA distributions (income statement)
- _____ Received pensions or annuities (income statement)
- _____ Rented out a home (documents showing rents and expenses)
- _____ Collected unemployment (income statement)
- _____ Received Social Security benefits (income statement)
- _____ Received any other miscellaneous income (income statement)

Reductions to Income

- _____ Contributed to an IRA (documents supporting contribution)
- _____ Paid interest on a student loan (documents showing payment)
- _____ Moved for job purposes (documents supporting expenses)
- _____ Paid for self-employment insurance (insurance documents)
- _____ Accrued penalties for early withdrawals on savings (documents)
- _____ Paid alimony (divorce decree)

Credits to Reduce Tax Liability

- _____ Iteming deductions (documents supporting deductions)
- _____ Paid for child care (provider's name, address, SSN or EIN)
- _____ Attended college (1098-T or documents supporting payments)
- _____ Adopted a child (adoption papers)