

CHECKLIST

Current State Issued Identification or Drivers License

Social Security Card (Everyone on the Return)

Birth Certificate for all Dependents

Head of House Proof Document -Utility bill

Work (Income documents) W2, 1099 NEC, K1 etc

Students 1098 T

Self-Employment – Profit and Loss statement, Business License, Ein Number, Bank statements, Receipts, Invoices, etc

Copy of voided check (For those that want to receive Direct Deposit only) Mark through all lines and write VOID on it Big