

Documents to bring to your appointment

- Form 13614-C - Intake/Interview & Quality Review Sheet (available online and at all sites)
Must be completed, with all questions answered, before we can prepare your return

Personal information:

- Photo ID with date of birth for each adult
 Social Security cards (or SSA-1099) for you, your spouse, and your dependents
 Copy of last year's Federal and DC/state tax returns for you and your spouse
 Bank account number and routing number, if depositing your refund directly into your account
 Any letters from the IRS (especially PIN notification)
 Form 1095-A if health insurance was purchased through the ACA Marketplace
 Record of estimated tax payments made to Federal and DC/state governments

Information about your income and that of your spouse and any dependents:

- SSA-1099 for Social Security benefits received
 1099-R for payments/distributions from IRAs or retirement plans. Provide date of retirement
 1099-INT, -DIV, -B, -S, or -K-1s for investment or interest income
 1099-G forms for unemployment income, state or local tax refunds, gambling winnings
 1099-C forms for cancellation of debt
 W-2, 1099-NEC, and 1099-MISC income forms
 Final pay stub from all employers if you had tip income or overtime income

Deductions and Credits:

- Itemized Deductions (Sch A) Worksheet (if claiming more than \$15,750)
 Major medical expense documentation; health insurance and Long Term Care premiums
 1098 mortgage interest and tax form or government-issued property tax statement
 Documentation of charity donations
 Documentation of energy efficiency home improvement expenses
 December rent receipt, plus landlord information (name, address, phone number) – D.C. residents

For students:

- Form 1098-E for student loan interest paid (or loan statements for student loans)
 Form 1098-T for tuition and other education expenses
 Loan forgiveness letter

For teachers:

- Some documentation for expenses paid for classroom supplies, etc.

For self-employed (including gig workers, such as for Uber, DoorDash, etc.):

- Self-Employed (Sch C) Worksheet
 Business income and expenses; papers from TaskRabbit, Lyft, etc. Mileage records
 Self-employed health insurance premium payment record
 1099-NEC forms for you and your spouse (for any independent contractor work)
 1099-K forms you receive from third-party payment sources (such as PayPal, eBay)

For parents:

- Childcare costs: provider's name, address, tax ID, and amount paid for year
 Adoption costs: SSN of child; records of legal, medical and transportation costs