

What do I need to have my taxes done?

Required Identification

- A government-issued photo ID
- Original Social Security Card(s) or Individual Tax Identification Number(s) for all individuals listed on the tax return
- Birthdates for all individuals listed on the tax return

Direct Deposit

- Direct deposit information: voided check or checking/saving routing and account number

Income

- Income statements or W2s for each job
- All 1099 forms received (if any)
- Year-end income for MFIP, SSI, MSA, GA, veterans' benefits, worker's compensation (if any)

Credits

- Education expenses for children in grades K-12 (pens, notebooks, tutoring, music classes, costs of instruments)
- Tuition expenses for university, college, or technical college (Form 1098-T)
- Interest statement for student loans (Form 1098-E)
- Childcare expenses: amount paid, provider name, address, tax ID or Social Security number

Deductions

- Documentation of charitable donations to qualified [501(c)(3)] nonprofit organizations
- Homeowner statements (Form 1098): mortgage insurance/interest and real estate taxes paid
- Out of pocket unreimbursed medical expenses

Health Care

- Forms 1095-A, B or C, Affordable Health Care Statements
- Exemption certificate from the Marketplace, if applicable

Property Tax Refund

- Certificate of Rent Paid (CRP)
- Statement of Property Taxes Payable in 2022

Other

- A copy of last year's tax return
- IRS Letter 6419, Advanced Child Tax Credit
- IRS Letter 6475, Third Economic Impact Payment and Plus-up Payments