GOING FOR TAX HELP OR RETURN PREPARATION? GO PREPARED WITH:

- Valid driver’s license or photo identification (self & spouse, if applicable)
- Social Security cards for all persons listed on the return
- Dates of birth for all persons listed on the return
- All income statements: Forms W-2 and 1099, Social Security, unemployment, other statements, such as, pensions, stocks, interest and any documents showing taxes withheld. If self-employed or you own a business, bring records of all your income
- All records of expenses, such as, tuition, mortgage interest or real estate taxes. If self-employed or you own a business, bring records of all your expenses
- Dependent child care information: payee’s name, address and SSN or tax ID number
- Proof of account at financial institution for direct debit or deposit (voided check with ABA routing number)
- Prior year tax return (if available)
- Any other pertinent tax documents or papers

Will you be paying a tax professional to prepare your return? Be sure to choose one who uses a Preparer Tax Identification Number (PTIN) and signs your return. It is against IRS regulations for preparers to omit either from your return. See irs.gov for additional information on how to choose a tax return preparer.

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