



THINGS TO GATHER BEFORE YOUR TAX PREP APPOINTMENT

- ☐ Social Security cards and IDs for you, your spouse and dependents
- ☐ Birth dates for you, your spouse and dependents on the tax return
- ☐ Wage and earning statements (W-2, W-2G, 1099-R, 1099-Misc, 1099-NEC) from all employers or payers
- ☐ Social Security benefit statement (SSA-1099)
- ☐ Unemployment benefit statement (1099-G)
- ☐ Interest and dividend statements from financial institutions (Forms 1099)
- ☐ Financial institution routing number and your account number for direct deposit
- ☐ Total paid for daycare expenses and the daycare provider's tax number, such as their Social Security number or Employer Identification Number
- ☐ Form 1095-A, Health Insurance Marketplace Statement
- ☐ If you are married and filing a separate tax return you will need your spouse's name, Social Security number, and date of birth