



Get ready for your tax appointment.

Gather what applies to you. Additional records may be needed for your situation.

Start here

- ☐ Last year's federal and state returns, if available
- ☐ Photo ID, taxpayer/dependent details and any IRS IP PINs
- ☐ All income forms, such as W-2, 1099 and SSA-1099
- ☐ Estimated or extension payment records and tax notices
- ☐ Direct-deposit details, if requested through the secure portal

Self-employment or side work

- ☐ Income records, including payments without a 1099
- ☐ Business expenses, receipts and mileage records
- ☐ Business asset purchases and estimated tax payments

Investments or digital assets

- ☐ Broker statements and sale/cost-basis records
- ☐ Digital asset transaction records, when applicable

Family, childcare or education

- ☐ Dependent details and childcare provider/payment records
- ☐ Education forms and qualified expense records
- ☐ Records for credits or deductions you want to discuss

Home, property or rental income

- ☐ Mortgage interest and property tax records
- ☐ Home purchase/sale documents, when applicable
- ☐ Rental income, expenses and property records

Health coverage or medical expenses

- ☐ Marketplace health coverage Form 1095-A, if applicable
- ☐ HSA records and medical expense records, if applicable

Use the secure Document Portal for tax documents. Do **NOT email or text sensitive information or forms.**

For a first conversation, bring your questions. We will explain when to share documents securely.