

Document Checklist - All information must be included

- Identification (NEW)- Social Security Card(s), Photo Identification (Driver's License, Military ID card, Government ID, etc.)***
- Dependent Records (NEW) - Child Social Security Cards, Birth Certificates or School Shot Records***
- Bank Information - Voided Check for Direct Deposit Purposes***
- Income Documentation - W-2, 1099-B (stock sale), 1099-Div (dividend), 1099-Int (interest), 1099-misc, 1099-R (retirement), 1099-SSA (social security), K-1 (partnership/corporation), Unemployment, Alimony, last paystub of 2012***
- Business Income & Expenses (please fill out the business worksheet found on our website)***
- Rental Income & Expenses (please fill out the rental worksheet found on our website)***
- Farm Income & Expenses***
- Itemized Deductions***
 - Medical Expenses (Must have Receipts)***
 - Medical/Charitable Mileage (Must have a Mileage Log)***
 - Real Estate Taxes***
 - Mortgage Interest (Form 1098)***
 - Charitable Contributions (Goodwill contributions must have a detailed list of items donated)***
 - Unreimbursed Employee Expenses (Must have a log for mileage)***
- Education Expenses - 1098-T (tuition statement), collegiate account summary, receipts for supplies (laptop, books, etc.)***