

Please provide the following Tax documents needed to prepare your return

- Please upload W-2 from your employer(s)
- Please upload 1099-DIV Dividends and Distributions from your financial institution(s)
- Please upload W-2G from your gambling winnings
- Please upload RRB-1099 from the Railroad Retirement Board (RRB)
- Please upload 1099-Misc from Other Income sources
- Please upload 1099-B from Broker and Barter Exchange Transactions
- Please upload K-1 from your S-Corporation
- Please upload 1098 from your bank or lender
- Please upload a picture of the Government Issued ID for each taxpayer on the return
- Please upload 1099-INT Interest Income from your bank(s)
- Please upload 1099-COMP from your financial institution(s)
- Please upload 1099-R from your Pension or Retirement provider
- Please upload SSA-1099 from the Social Security Administration
- Please upload 1099-Q from Qualified Education Programs
- Please upload K-1 from your Partnerships
- Please upload K-1 from your Trusts or Estates
- Please upload 1099-G from the government
- Miscellaneous Documents

Please provide the following information needed to prepare your tax return

- What is your current address? _____
- Did your marital status change before the end of last year? _____
- Were there any changes in dependents? _____
- Did you have any child or dependency care expenses? Please include care provider's name, address, SSN, and amount. _____
- Did you buy or sell stocks, mutual funds, bonds, or other investment properties? _____
- Did you donate money, clothes, cars, or stock? _____
- Did you incur any tuition or continuing education expenses? _____
- Did you receive a distribution from or make a contribution to a retirement plan (401(k), IRA, etc.)? _____
- Did you and your dependents have health care coverage for the full-year? _____
- Did you receive any of the following IRS documents? Form 1095-A, 1095-B, or Form 1095-C? If so, please send. ___
- Did you receive advance payments of the Child Tax Credit? If so, how much? _____
- Did you receive the third Economic Impact (Stimulus) Payment? (Paid on or after Mar 12, 2021) If so - what amount did you receive? _____
- Did you make any estimated payments or apply a prior year's refund to 2021? If so, how much? _____
- Did you have a side business or gig? _____
- For direct deposit, please provide your bank name, routing number, and account number. _____
- Do you want to electronically file your tax return? _____
- Please load any other document not listed above that is pertinent to preparing your tax return _____
- Please list any questions or other concerns you might have. _____
- Did you buy sell or trade any Cryptocurrency in 2021? _____