



LIST OF REQUIREMENTS YOU NEED

As you come into the office this year or prepare your taxes with us from home virtually, here is a detailed list of documents that are essential to completing your tax return. Remember, all taxes are different for each case, select the requirements that only apply to your case. Call us to Schedule your appointment 301-567-0928 or send us the information by email, or if you would like to just drop off your documents, call the office to let us know you'll be coming by. 6805 Livingston Rd. Oxon Hill, MD 20745

TAXPAYER AND SPOUSE'S DOCUMENTS

Taxpayer's and Spouse's drivers license or other federal ID with photo or Passport

Taxpayer and Spouse's social security card with your number or tax ID number

Health Insurance Card:

Copy of last years Taxes:

INFORMATION OF YOUR DEPENDENTS

Birth Certificate (this is only required your first year filing with us or if this is a new born child):

Social security number(s) or tax ID number(s) (this is only required your first year filing with us or if this is a new born child):

Health Insurance Card:

School Records:

Income of other adults in your home:

Form 8867: if you come to our office for the first time to do taxes, you must bring this form from the previous year in order to comply with the due diligence requirement to determine the taxpayer's eligibility and the head of household filing status.:

College Credits:

The American opportunity tax credit (AOTC) (1098T):

Lifetime Learning Credit:

FORMS OF INCOME

Employed: W-2:

Self Employed: 1099NEC: K-1:

Unemployment: State Return (1099G):

Other interest income: 1099INT: 1099DIV:

Investments: 1099INT:

Savings account: 1099INT:

Games/Bets: W-2G:

Payment Card and third Party Transactions: 1099-K :

Distributions from Pensions 1099-R : 1099-SA :

Miscellaneous Income: From 1099-MSC :

Other 1099 :

EXPENSES

1098: 1098C: 1098E: 1098H: 5498: 5498ESA: