



TAX TIME LESS TAXING.

Ready to File? Let's Make It Happen Together.

Bring These Documents to Get Started

- Valid ID for You (and Your Spouse)
- Social Security Card for You (and Your Spouse)
- Social Security Card for Dependents or Prior Year's Tax Return
- All W-2 Forms
- All Other Income Documents (Social Security Benefits, Unemployment, Retirement and any other 1099 forms)
- Childcare Expense Forms (Statement from Daycare Provider)
- Education Forms (1098-T for Students and 1098-E for Student Loan Interest)
- Health Savings Account Information (HSA)
5498-SA/1099-SA Forms
- Marketplace Insurance Form 1095-A
- Self-Employment Info (Proof of Income, Receipts, Expenses)
- Direct Deposit Details (Voided Check/Bank Letterhead)



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