



**DROP-OFF GUIDELINE & WHAT TO BRING TO YOUR TAX APPOINTMENT
OR UPLOAD TO YOUR PORTAL**

It has become a security issue for us to receive pictures or files by text. Email is not secure; the preferred and most secure way is thru our SECURE PORTAL. We will not accept information by text.

- **FORM 1095 A, IF HEALTH COVERAGE WAS THROUGH THE “MARKETPLACE” OR OTHER HEALTH INSURANCE DOCUMENTS**
- **DRIVER’S LICENSE (S) REQUIRED FOR TAXPAYER and/or SPOUSE**
- **HSA TAX DOCUMENTS (FORM 1099SA)**
- DEPENDENTS’ SOCIAL SECURITY NUMBERS & DATES OF BIRTH
- LAST YEAR’S FEDERAL & STATE TAX RETURNS (FOR NEW CLIENTS ONLY)
- WAGE STATEMENTS- FORM W-2
- PENSION OR RETIREMENT INCOME- FORM 1099-R
- INTEREST & DIVIDEND INCOME- FORM 1099-INT/ FORM 1099- DIV
- STATE INCOME TAX REFUND AMOUNT- FORM 1099-G
- SOCIAL SECURITY INCOME- FORM SSA-1099
- UNEMPLOYMENT INCOME- FORM 1099-G
- COMMISSIONS RECEIVED/ PAID
- INFORMATION OF SALES OF STOCKS OR BONDS- FORM 1099-B
- SELF-EMPLOYED BUSINESS/ FARM INCOME & EXPENSES- FORM 1099-MISC
- LOTTERY OR GAMBLING WINNINGS- FORM W-2G
- LOTTERY OR GAMBLING LOSSES
- INCOME & EXPENSES FROM RENTALS
- IRA CONTRIBUTIONS
- ALIMONY PAID OR RECEIVED
- CHILD CARE EXPENSES & PROVIDER INFORMATION
- MEDICAL, EYE CARE & DENTAL EXPENSES
- CASH & NONCASH CHARITABLE DONATIONS
- RECORD OF PURCHASE OR SALE OF RESIDENCE
- MORTGAGE OR HOME EQUITY LOAN INTEREST PAID- FORM 1098
- REAL ESTATE TAXES PAID
- STUDENT LOAN INTEREST STATEMENTS

DROP-OFF GUIDELINES

- ALLOW TIME FOR COMPLETION OF OUR REQUIRED INFORMATION FORMS (EVEN FOR YOUR DEPENDENT RETURNS)
- MAKE SURE TO HAVE COPIES OF DRIVER'S LICENSES FOR THE TAXPAYER/TAXPAYERS NOT PRESENT (DEPENDENT RETURNS ALSO)
- BANKING INFORMATION IS OF **UTMOST IMPORTANCE**, PLEASE HAVE THIS AT DROP OFF TIME (AGAIN FOR DEPENDENT RETURNS ALSO)
- REMOVE ALL DOCUMENTS FROM THEIR ENVELOPES OR AT LEAST HAVE THEM OPENED