

Taxpayer Checklist

Identification Documents:

1. Photo ID
 - Taxpayer
 - Spouse
2. Social Security Card
 - Taxpayer
 - Spouse
 - Dependents
3. IRS CP01A Notice
 - Identity Protection PIN (Not the one from prior year)

Income Documents:

4. W-2
 - Each job you worked during 2021
5. W-2G
 - Gambling Winnings
6. 1099NEC
 - Unemployment Compensation
7. 1099R
 - Retirement / Pension
8. SSA-1099
 - Social Security Benefits Statement
9. RRB-1099
 - Railroad Retirement Benefits

IRS Notice Letters:

10. IRS Notice 1444C
 - Economic Impact Payment 3 (Third Stimulus Payment)
11. IRS Letter 6419
 - Advance Child Tax Credit Payments

MISC:

12. 1098
 - Mortgage Interest Statement
13. 1098-T
 - Tuition Statement

Banking Information:

14. Routing Transit Number & Account Number (Checking and Savings Account-let us help you save)

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Note: If you had any Child & Other Dependent Care Expenses bring all receipts. (Qualifying child who is your dependent and who was under age 13 when the care was provided)

Business Owners: All Business Expense Records

The links below will take you to access any related IRS and/or State accounts to obtain any additional documents/information (e.g., unemployment):

IRS- Account Login: <https://www.irs.gov/payments/view-your-tax-account>

IRS- Homebuyers Credit Login: <https://sa.www4.irs.gov/irfof-fthb/login>

Georgia Department of Labor: <https://www.dol.state.ga.us/public/uiben/customer/login>

Alabama Department of

Labor: https://labor.alabama.gov/uc/Claimant_1099G/default_1099G_Disclaimer.aspx

<https://www.irs.gov/newsroom/get-ready-for-taxes-easy-steps-taxpayers-can-take-now-to-make-tax-filing-easier-in-2022>