

TAX CHECK LIST – 2022

1. Names and birth dates, all on the return.
2. Bring all tax documents – W-2, etc.
3. If A.C.A. Insurance, bring Form 1095-A
4. Info for all dependents & children living with you
5. Bring any and all 1098 or 1099 Forms
6. Property Tax bill if homeowner
7. Documents for interest and/or dividend income
8. Charitable donations total dollars
9. Bring 2021 Tax Return if possible
10. Banking info in case of refund