



TAX DOCUMENTS

CHECKLIST

General Information

- Driver's License/State ID
- Social Security Card (not required, but recommended)
- W-2 Forms
- 1099 Forms (Retirement, SSI, Unemployment, Contract Labor/Self Employment, 3rd Party Transactions)

Education Information

- 1098-T Form
- Breakdown of College Expenses
- Daycare Tax ID and Amount Paid

Miscellaneous Information

- Direct Deposit Information
- Mortgage Interest
- Student Loan Interest

Healthcare Information

- Any letter or documents from Marketplace (Obamacare)

Dependent Documentation

If this is the same biological child(ren) that was claimed on your tax return in the previous year, it is not necessary to provide any of the following.

If the dependent(s) are not your biological child(ren) or were not claimed on your tax return in the previous year, please provide at least ONE form of documentation from the following list that includes the dependent's address:

- Current Year School Records
 - Social Service Records (DHS)
 - Medical Records
 - Landlord Statement
 - Childcare Records
 - Employer Statements
 - Placement Letter (for non-biological children)
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