



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)

Education Information

- 1098-T Form
- Breakdown of College Expenses
- Daycare Tax ID and Amount Paid (**We will no longer be able to look up last year's information so you must provide this.**)

Miscellaneous Information

- Direct Deposit Information
- Mortgage Interest
- Student Loan Interest
- IRS Letters 6419 & 6475 (Child Tax Credit and Stimulus Payment amounts received). Or, log on to IRS.gov and select "View Your Child Tax Credit Payments" and document the amounts shown.

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)
-