

What to bring?

✓ TAX TIME CHECKLIST

Choose what is applicable



- ✓ 1. Photo ID
- ✓ 2. Social Security Card, *or* Verification letter, *or* Individual Taxpayer Identification Number (ITIN) assignment letter, for all family members.

Bring all or any applicable Tax-related forms or documents received in the prior year, such as:



- ✓ 1. All W-2 Forms, for all jobs worked in the prior year.
- ✓ 2. All W-2G and 1099 forms for other income and state *or* local tax refunds in the prior year, such as: (SSA-1099 *or* SSA-1042S *Social Security Benefits*, 1099-NEC/MISC *Self Employed/Independent Contractor*, 1099-R *Retirement*, 1099-G *Unemployment compensation*, 1099 A, B *Virtual Currency Transactions, Broker & Barter*, 1099-DIV *Dividends*)
- ✓ 4. Child care provider name, address, and tax ID number, and amount paid in the year.
- ✓ 5. Copy of last year's state and federal tax returns.
- ✓ 6. Any other applicable tax-related documents or Forms of income received the prior year, such as: *Federal loan documents, List of organizations to which you made charitable donations, etc.*



- ✓ 1. A list of the people on your tax return with health insurance coverage and which months they were covered.
- ✓ 2. Form 1095-A, ***Must have if you or anyone on your tax return had even one day of coverage through the national or state health insurance marketplace.***
- ✓ 3. Form 1095-B or 1095-C, which was mailed to you (*if you had coverage from another source, not everyone with insurance will receive these forms this year.*)



- ✓ 1. Banking *or* credit union account information.
- ✓ 2. Voided check *or* savings deposit slip.

For more Information *or* Questions

Call { (863) 439 - 1834
(863) 439 - 7834 (During Site Hours ONLY).

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Times and schedules may vary, please contact us
for business hours of a particular location.

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You can also visit our website:

www.PPCWaverly.com

