



What to bring to your tax appointment

Start with the first box, then add the boxes that fit you. Bring copies or clear phone photos. Missing something? Bring what you have; we can often request the rest.

EVERYONE

- ☐ Photo ID for you and your spouse
- ☐ Social Security numbers or ITINs for everyone on the return
- ☐ Last year's return
Including last year's AGI and refund amount
- ☐ Bank routing and account number
For direct deposit of your refund
- ☐ Any letters from the IRS or Georgia Dept. of Revenue
- ☐ IRS Identity Protection PIN letter, if you have one
Notice CP01A

WORK AND FAMILY

- ☐ All W-2s, and 1099-G for unemployment
- ☐ Childcare costs and the provider's tax ID
- ☐ 1098-T tuition and 1098-E student loan interest
- ☐ 1095-A if you had Marketplace health insurance

TIPS OR OVERTIME

- ☐ Employer statements or pay stubs showing tips and overtime
See our tips and overtime add-on checklist

SIDE HUSTLE OR GIG WORK

- ☐ 1099-NEC from clients or platforms
- ☐ 1099-K from payment apps or marketplaces
- ☐ App and processor statements for the year
- ☐ Expense receipts and your mileage log
- ☐ Estimated tax payments you made

HOME, SAVINGS AND RETIREMENT

- ☐ 1098 mortgage interest and property tax bills
- ☐ 1099-INT, 1099-DIV and 1099-B from banks and brokers
- ☐ 1099-R and SSA-1099 for retirement and Social Security

BUSINESS OWNERS

- ☐ Profit and loss statement or bookkeeping file
- ☐ Business bank and card statements
- ☐ Payroll reports and any K-1s
- ☐ Last year's depreciation schedule

Book your appointment in one call.

An Atlanta tax team that explains your return in plain language.

(800) 850-5237

jafinancialsolutions.com