

TAX ASSISTANCE CHECKLIST



Bring With You:

1. 2009 income information:
 - a. W-2 forms for EVERY job you worked in 2009.
 - b. ALL 1099 forms
2. Social Security or ITIN cards for:
 - a. Yourself
 - b. Your spouse
 - c. All qualifying children or dependents.
3. Picture ID
4. Account and Routing (ABA) numbers for checking and saving accounts for direct deposit
5. Your 2008 tax return (if you filed)
6. Total amount of rent paid in 2009
7. Documentation of higher education expenses: tuition paid, student fees, and student loan interest payments.
8. Daycare expenses and the provider's name, address, and tax ID number.
9. If you own your home:
 - a. Charitable contributions
 - b. Mortgage interest
 - c. Property taxes
 - d. Medical expenses
10. ALL OTHER tax mailings



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