

Worry Less. Live More.



A New Kind of Tax Services

405-657-0050 phone

405-254-7796 text

Customer Tax Document Checklist

- **Government issued photo ID (e.g., your driver's license)**
- **2019 and 2020 federal and state tax returns**
- **Social Security Card Copy**
- **IRS Notices 1444-C or IRS Letter 6475 - Stimulus Payments**
- **Social Security cards for each child**
- **IRS Letter 6419, Advanced Child Tax Credit payments**
- **Wage Statement - form W-2s from this year**
- **1099s**
- **1098-T, Tuition Statement**
- **1098-E, Student Loan Interest Statement**
- **Charitable donation receipts**
- **1098, property tax bill, or mortgage interest statement**
- **1095-A, Health Insurance Marketplace Statement**
- **1099-INT, 1099-OID, or 1099-DIV**
- **1099-R, Distribution Form Pensions**