



# 2024 TAX PREPARATION DOCUMENT CHECKLIST



- ✓ Valid government ID for you (and your spouse)
- ✓ Social Security cards or ITIN for you and any dependents being claimed on your tax return
- ✓ Voided check or bank statement with routing and account number for direct deposit
- ✓ All income statements:
  - ✓ W-2
  - ✓ 1099-G (unemployment)
  - ✓ All 1099 Forms
  - ✓ 1099-R (pension)
- ✓ Your tax return from last year
- ✓ Child-care expenses
  - ✓ Daycare Provider's Name, Address, and EIN
- ✓ If you purchased health insurance through the marketplace:
  - ✓ Form 1095-A
- ✓ If you have paid tuition for higher education:
  - ✓ Form 1098-T
- ✓ If you are a victim of identity theft:
  - ✓ Your current year IP-PIN (assigned by IRS)
- ✓ Any other tax-related information

## To participate, you need the following:

- ✓ Income of equal to or less than:
  - ✓ \$50,000 for single filers
  - ✓ \$80,000 if you have dependents
- ✓ An **appointment** for tax preparation

## For virtual appointments you will also need the following:

- ✓ A **valid** email address
- ✓ A **smartphone** to access video conference and the TaxSlayer platform



**800-290-7189**  
Call With Questions