

BASIC INFO

- ☐ Driver's License(s) or Government Issued Identification
- ☐ Social Security Card(s)/ ITIN(s)
- ☐ Dependents' Social Security Numbers/ ITIN(s) & Dates of Birth
- ☐ Last year's Federal & State Tax Return

INCOME

- ☐ W-2's*
- ☐ Wage Statements*
- ☐ Self-Employment business Income & Expenses*/ 1099-MISC*/ 1099K*
- ☐ Commissions Received/Paid*
- ☐ Pension/ Retirement Income/1099-R*
- ☐ Unemployment Income/ 1099-G*
- ☐ Cancelled Debt Amount/ 1099-C*
- ☐ Social Security Income/ SSA-1099*
- ☐ IRA Contributions*
- ☐ Statements on the Sales of Stocks & Bonds/ 1099-B*
- ☐ Interest & Dividend Income/ 1099-INT* & 1099-DIV*
- ☐ Lottery or Gambling Winnings/ Losses W-2G*
- ☐ State Refund Amount/ 1099-G*
- ☐ Income & Expenses from Rental Properties*
- ☐ Alimony Paid/ Received*
- ☐ Income & Expense for Royalties*
- ☐ K-1's from Partnerships, S-Corps & Trusts*

HEALTHCARE

- ☐ Form 1095-A (Health Insurance Marketplace Statement)**
- ☐ Form 1095-B (Health Insurance Provider Statement)
- ☐ Form 1095-C (Health Insurance Employer Provided Coverage Statement)
- ☐ Exemption Certificate Number***

EXPENSE & OTHER ITEMS

- ☐ Record of Purchase or Sale of Residence*
- ☐ Medical & Dental Expenses*
- ☐ Real Estate & Personal Property Taxes*
- ☐ Child Care Expenses & Provider Information*
- ☐ State or Local Taxes Paid*
- ☐ Estimated Taxes or Foreign Taxes Paid*
- ☐ Cash & Non-Cash Charitable Donations*
- ☐ Mortgage or Home Equity Loan Interest Paid/1098*
- ☐ Unreimbursed employment-related Expenses*
- ☐ Job-related Educational Expenses*
- ☐ Moving Expenses*
- ☐ Casualty or Theft Losses*
- ☐ Student Loan Interest/ 1098-E*
- ☐ Sales Tax Paid on Major Purchase*
- ☐ Educator Expenses*
- ☐ Tuition & Education Fees/ 1098-T*

* If Applicable

** If you received requirement by the Marketplace (Exchange) health insurance from Marketplace (Exchange)

*** If you were exempt from health insurance