

Before Submitting Your Documents

Collect Proof of Income

If you worked a job where you are paid hourly or salary

- Do you have all of the Forms W-2 from all of the jobs that you worked in 2021?

If you were self-employed or do gig work

- Do you have all of the Forms 1099-K, 1099-MISC or W-2s?

If you received unemployment

- Do you have your Form 1099-G for your unemployment benefits?

If you received a 2021 Economic Impact Payment (Stimulus)

- Do you have Letter 6475 detailing your Economic Impact Payment?

If you received Advance Child Tax Credit payments

- Do you have Letter 6419 detailing your Advance Child Tax Credit payments?

If you took distributions from your retirement account

- Do you have the 1099-R from each account you took a distribution from?

Collect Bank Forms

Make sure you have all of the forms detailing interest paid and received.

- All forms 1099-INT's from savings accounts where you earned interest
- All forms 1098-E or 1098-T detailing student loan interest paid
- All forms 1098 Mortgage Interest Statement

When You're Submitting Your Documents

Have all necessary forms of identification

- Your unexpired photo identification
- Social Security cards for everyone on the tax documents (including dependents)

Have all bank information if you'd like direct deposit

- Your bank account number
- Your bank's ABA routing number