

Documentation needed to complete Tax Return:

- Military Identification Card
- Social Security Cards for Taxpayer, Spouse, and Dependents
- Last year's Federal Tax Return
- All W-2, 1099-MISC, 1099-R, 1099-INT, SSA-1099, 1099-DIV, 1099-B, 1098, 1098-T
- December LES
- HUD-1 for homes purchased in 2011
- Real Estate Tax Receipts
- New or Used Car, Motorcycle, Motor Home, etc purchased in 2011 (Schedule A)
- Out of Pocket Medical Expenses
- Charitable Receipts
- Child Car Expense Receipts
- Education Expense Receipts
- IRA Contribution documentation
- Voided Check or other Account and Routing Number documentation

Click here for [InTake Sheet](#)

\*\* PLEASE ARRIVE 15 MINUTES EARLY