Required Documentation

**HCS Tax and Financial Services Form Checklist**

* Government issued ID for taxpayer and Spouse
* Last year’s tax return (new client)
* W2’s
* 1098 - Real Estate/ Mortgage interest
* Closing Disclosure - Refinance, Purchase Home
* 1099 INT - Savings/ Checking
* 1099 –DIV Mutual Funds (usually sent after Feb 17 please go online if you have not received)
* 1099- Misc - Self Employment,   Unemployment
* 1095 A,B,C -Affordable Care Act
* Out of pocket medical expenses
* Charitable Donations – List & Receipts.
* Social Security Card (copy)
* 1098 E -Student Loan Interest
* 1098 T - Tuition
* If you receive an EIC (Earned Income Credit) , Child Tax Credit (CTC) or American Opportunity Credit (AOTC) 1098 T. We need to have copies of SS Card / Birth Certificate or a letter from the School or a Doctor’s Office stating proof of residency and guardianship.
* All receipts should be added before sitting with tax preparer. Clients will be charged an extra fee for receipts not add