

In order to prepare your tax return, the IRS requires that we verify your identity with a government issued PHOTO ID and that we see social security cards for all people listed on the tax return.

YOU NEED TO BRING HARDCOPIES OF:

- All income statements, such as W-2's, 1099's, Social Security (SSA-1099), SSI statements, Schedules K-1, and 1099-G (proof of unemployment compensation)
- Social Security Cards or Individual Taxpayer Identification Numbers (ITIN) cards for all people listed on the tax return
- Valid picture ID for taxpayer and spouse (Driver's License, State ID, Passport)
- Copy of last year's tax return (when possible)
- 1098 mortgage interest and/or real estate tax receipt
- Voided check or bank account and routing numbers for direct deposit
- Intake form if received in the mail – also available on website

ALL
TAXPAYERS

- Proof of childcare expenses
- 1098-E student loan interest
- Forms 1098-T from educational institutions
- Form 1095-A (proof of health insurance from Marketplace)
- Form 5498-SA showing HSA contributions
- Form 1099-SA showing HSA distributions
- For MO-PTC/Circuit Breaker – proof of real estate or rent paid, dates, landlord name, address and phone number
- Parcel number (Illinois homeowners only)
- Anything else you receive that says "Important Tax Document"
- If married filing jointly – both spouses must be present to sign

WHEN
APPLICABLE

Every taxpayer's situation is unique. It is impossible to list all the items one must bring in for a tax appointment for every type of tax situation. When in doubt, bring the item with you.

REMINDER: Restrictions and closures are likely to happen during the season.

Please check our website, www.gatewayeitc.org or call 314-539-4062 for up-to-date information on the day of your appointment.

Thank you for your understanding and flexibility.