

My Tax Appointment:

Date: _____

Time: _____

At: Beverly Bootstraps, 35 Park Street, Beverly

Items to Bring:

When you come to your Intake appointment, be sure to bring:

1. **Photo ID** such as Driver's License or Passport;
2. **Social Security cards** for you, your spouse, and all dependents;
3. **A copy of last year's tax return;**
4. **Income information:**
 - Wages and earnings (Form W-2, 1099-Misc, 1099-NEC, 1099-K) from all employers;
 - Social Security (SSA-1099), pensions or IRA (1099-R);
 - Interest from banks (1099-INT) and dividends (1099-DIV);
 - Unemployment Compensation (1099-G);
 - Gambling or Lottery winnings (W-2G);
5. **Health insurance information:**
 - Health Insurance Cards and coverage information (1095-A, 1095-B, or 1095-C, 1099-HC);
6. **Information about Expenses:**
 - Childcare expenses: statement from daycare provider with amount paid and the provider's tax ID number;
 - Education expenses: Tuition: 1098-T, Student loan interest: 1098-E;
7. **Homeowners 65 and over:** property tax and excise tax bills, water/sewer bills;
8. **Bank account information:** routing and account numbers for direct deposit, such as a blank check, which will be returned to you;
9. **Both spouses must be present** to file a **married-filing-jointly** tax return, and **both must sign** the required forms.