

# TAX TIME CHECKLIST

We require the following from you and your spouse:  
(if applicable)

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Drivers License

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Bank Name, Acct Type (checking or savings), Account #, Routing #

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Any source of income: W2 or 1099

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Social Security statement

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Form 1099-G if you recieved any unemployment

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Form 1098-T if you took any college classes or have a student in college

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1099 forms for bank interest, dividends, investments

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Form 1095-A Marketplace Insurance

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Form 1098 mortgage interest

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Property tax paid

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Renters (if Indiana resident) - amount per month & # of months

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Childcare name and address of the provider plus total paid in 2024