



## THINGS TO BRING TO YOUR APPOINTMENT

### YOUR APPOINTMENT DATE & TIME--\_\_\_\_\_

*BEFORE YOUR APPOINTMENT, PLEASE READ AND SIGN ALL CONSENT FORMS AND ANSWER ALL QUESTIONS ON THE INTAKE FORM*

**FOR DIRECT DEPOSIT—BRING CHECKBOOK OR BANK ROUTING AND ACCOUNT. COPY OF CHECK IS BEST**

**MULTIPLE EXPENSES FOR DEDUCTIONS SHOULD BE ADDED AND SUMMARIZED ON A SHEET**

**ALL ENVELOPES SHOULD BE OPENED AND PAPERWORK ORGANIZED**

**NO BUSINESS RETURNS PREPARED EXCEPT FOR SCHEDULE C**

**ONLY 1 RETURN PER APPOINTMENT**

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### ITEMS TO BRING

- Photo ID, Driver's License, Last Year's Tax Return
  - Social Security Card for taxpayer, spouse and dependents
  - Birth Dates for taxpayer, spouse and dependents
  - W2-Wages/Earnings
  - W2-G Gambling Winnings
  - 1099G Unemployment
  - 1099R Pension/Annuity
  - SSA-1099 Social Security Statement (Has a Pink Box)
  - 1099INT and 1099DIV Interest and Dividends
  - 1099B Brokerage Statement (**APPOINTMENT MUST BE AFTER MARCH 15<sup>th</sup>**)
  - 1099MISC Miscellaneous Income
  - 1099NEC Non-Employee Compensation
  - Alimony, Date of divorce, amount, former spouse full name, former spouse SS#
  - Form 1444 Stimulus Payments received
  - 1098-T Education, Tuition
  - Dependent/Childcare-Provider's name, address, EIN #, amount paid for each child
  - Rent-Landlord's name, address, phone #, amount paid-For Property Tax Relied Credit
  - Proof of Health Insurance-1095A if from the marketplace/Healthsource RI
  - Covid-19 Sick Leave, Family Leave information, if applicable
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**FOR INFORMATION OR AN APPOINTMENT PLEASE CALL PATTY BREEN BETWEEN 9AM AND NOON BEGINNING JANUARY 15, 2023. 401-246-1678**

**For information or an appointment, please call Patty Breen at 401-246-1678**