***Willie Porter & Associates***

The Traveling Taxman, Inc.

4801 Southwick Drive, Suite 605, Matteson, IL 60443

 (708) 679-9211

Bring These Items to your Tax Appointment

* Copy of your **2022** tax return **NEW CLIENTS ONLY**
* Social Security Numbers for you, your spouse, and any children in the household born before December 31, **2023**
* W-2 forms for all jobs worked in **2023**
* 1099-R, if money was received from 401K distributions in **2023**
* 1099-G form, if unemployment insurance benefits were received at any time in **2023**
* 1099-INT, if bank interest was received in **2023**
* 1099-MISC or NEC, contract work or self-employed in **2023**
* 1098 form (statement received from mortgage company)
* Real Estate taxes statement if not included on your mortgage statement
* Copy of your current tax bill
* Form W2-G, if gambling income was received in **2023**
* Charitable contributions statements
* Children care provider statement, including tax identification number, address and total amount paid
* Form 1098-E or 1098-T (Student loan interest statement)
* Tuition payment statement
* Bank’s routing and account number (for direct deposit of funds)