***Willie Porter & Associates***

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**Bring These Items to your Tax Appointment**

* Copy of your 2019 tax return – **NEW CLIENTS ONLY**
* Social Security Numbers for you, your spouse, and any children in the household born before December 31, 2020
* W-2 forms for all jobs worked in 2020
* 1099R, if money was received from 401K distributions in 2020
* 1099-G form, if unemployment insurance benefits were received at any time in 2020
* 1099-INT, if bank interest was received in 2020
* 1098 form (statement received from mortgage company)
* Real Estate taxes statement if not included on your mortgage statement
* Copy of your current tax bill
* W2- G, if gambling income was received in 2020
* Charitable contributions statements
* Children care provider statement, including tax identification number, address and total amount paid.
* Student loan interest statement
* Tuition payment statement
* Voided check or bank’s routing and account number (for direct deposit of funds)