

Willie Porter & Associates

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Bring These Items to your Tax Appointment

- Copy of your 2020 tax return – **NEW CLIENTS ONLY**
- Form 6419 – **Advanced Child Tax Credit**
- Form 6475 – 3rd Economic Impact Payment (**Stimulus** payment)
- Social Security Numbers for you, your spouse, and any children in the household born before December 31, **2021**
- Form W-2 for all jobs worked in **2021**
- Form 1099-R, if money was received from 401K distributions in **2021**
- Form 1099-G form, if unemployment benefits were received at any time in **2021**
- Form 1099-INT, if bank interest was received in **2021**
- Form 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 **2021**
- 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)