

Willie Porter & Associates

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Bring These Items to your Tax Appointment

- Copy of your 2021 tax return **NEW CLIENTS ONLY**
- Social Security Numbers for you, your spouse, and any children in the household born before December 31, 2022
- W-2 forms for all jobs worked in 2022
- 1099-R, if money was received from 401K distributions in 2022
- 1099-G form, if unemployment insurance benefits were received at any time in 2022
- 1099-INT, if bank interest was received in 2022
- 1099-MISC or NEC, contract work or self-employed in 2022
- 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 2022
- 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)