

APPOINTMENT DOCUMENTS

What to bring to your appointment:

- Government issued IDs are required for the taxpayer/spouse.
- Copy of last year's tax return and Social Security card(s).
- Social Security cards for any dependents on the return.
- W-2 forms from each employer.
- 1099-G Unemployment compensation forms.
- 1095-A from the health insurance purchased through the marketplace.
- SSA-1099 forms if you received Social Security benefits.
- All 1099 forms (1099-INT, 1099-DIV, 1099-B, etc.) showing interest and/or dividends and documentation showing original purchase price of assets sold.
- 1099-MISC/1099-NEC for miscellaneous or self-employment income.
- 1099-R form if you received a pension, annuity, or IRA distribution.
- Tabulated total of cash income and expenses if self employed.
- All forms indicating federal and state income tax paid.
- Dependent care provider information (name, address, employer ID or Social Security number, amount paid).
- Names, dates of birth, and Social Security cards for all dependents.
- Homeowners – amount of real estate taxes paid in 2024.
- Renters – amount of rent paid in 2024, name and address of landlord.
- Any other tax forms received
- IRS forms indicating the amount of Advanced Child Tax Credit payments you received.
- Did you receive either one of the Indiana Automatic Taxpayer Refunds?
- Any other tax forms received.