**Items to bring**

- Photo identification-required to pickup completed return

- Social Security cards for you, spouse and dependents

- Birthdates for you, spouse, and dependents

- Last year’s federal and state tax returns

- Bank routing and account number for direct deposit (blank check)

- If you have health insurance through the insurance marketplace please bring Form 1095-A

**Documents for Income Received**

- W-2s from any employers

- Cancelled Debt/ Form 1099-C

- Dividends/Form 1099-DIV

- Gambling/Lottery winnings/Form W-2G

- Interest/Form 1099-INT

- Miscellaneous/Form 1099-Misc

--Non-employee Compensation/Form 1099NEC

- Pension/retirement/Form 1099-R

- Self-employment-business income/Form 1099-Misc

- Social Security income/Form SSA-1099

- Unemployment/Form 1099-G

- Alimony received

-Recovery rebate credit amounts

**Documents for Expenses Paid**

- Student loan interest/Form 1098-E

- Tuition and education expenses/Form 1098-T (PSU Students look on LIONPath website)

- Unreimbursed educator expenses

- IRA contributions

- Alimony paid

- Daycare provider’s information (name, tax ID, amount paid)

-HSA contribution

**If filing status is:**

**Married filing jointly**, **BOTH** taxpayers must be present to sign the completed return before we can e-file.

**Married filing separately**, you will need your spouse’s Social Security number and name as it appears on the Social Security card.