



TAX PREPARATION CHECKLIST

Information for each member listed on the tax form:

- Photo ID
- Social Security Cards (SSN)
- Date of birth
- Child care records, including the provider's name, ID number and address (if claiming deduction for Child and Dependent Care Expenses)

Income & tax information for the tax year:

- W-2 forms from all employers
- 1099 forms other tax statements received for the tax year
- Form 1095-A for health insurance
- Amount(s) and date(s) of each payment of estimated taxes during the tax year
- Information about any self-employment income
- Receipts from rental, real estate, royalties, partnerships, and trusts
- Social Security benefits
- Receipts for deductions including tax receipts
- Rent receipts, name and address of landlord if claiming renter's deduction on Indiana State return
- Voided check or savings account routing number for direct deposit of refund

These tax returns WILL NOT be processed at the Tax Preparation at MRL:

- Ohio State Returns
- Military Returns
- International Returns
- Cancellation of debt other than credit cards
- Bankruptcies
- Rental Property

Individuals with tax returns that are deemed to be too complicated will be referred to a tax professional.