



# Common Info & Tax Docs

## Required Info

- Image of Driver's License or State-Issued ID
- 2020 Stimulus Check 1 Total
- 2020 Stimulus Check 2 Total
- Updated Banking Information
- Dependent Information
  - SSN
  - DOB
  - Full Name
  - Primary Residence Address
- Filing Status
  - Single
  - Head of Household
  - Married Filing Joint
  - Married Filing Single
  - Qualifying Widower

## Common Tax Documents

- W-2's & 1099's
- 1099G for Unemployment
- 1099R for Retirement Income Distribution
- 1099SSA for Social Security Income
- 1099DIV for Dividend Payments (Even if Reinvested)
- 1099B for Stock Exchanges (Even if Reinvested)
- 1099INT for Interest Income
- 1098 for Mortgage Interest Paid
- 1098T for Tuition Payments
- 1098E for Student Loan Interest Paid
- Closing Agreement for the Sale or Purchase of a Home