

What to Bring:

- Your photo ID
- Social Security Cards or ITIN letters for anyone on the return
- Copies of all applicable 1099 forms: 1099-G (unemployment), 1099-R (retirement payments), 1099-INT (interest statements), 1099-SSA (Social Security), 1099-NEC (self-employment), 1099-MISC (miscellaneous income)
- For self-employed: a list of deductible expenses by category. For Uber/Lyft and similar app-based self-employment, any tax time documents they prepare for you which include mileage and other deductible expenses.
- W2 forms from all jobs in 2021
- Routing and account number for direct deposit, if desired
- Health insurance forms: 1099-HC for the Massachusetts state return (unless you had MassHealth or Medicare/Medicaid), and 1095-A if you had Health Connector health insurance
- For daycare/childcare expenses, a letter from your childcare provider with their name, address, and Employer Identification Number (EIN) or Social Security Number (SSN)
- Form 1098-T and a list of expenses for post-secondary education (college in any form: associates, bachelors, or graduate education)
- Form 1098-E if you paid on student loans
- The amount of all rent paid in 2021
- Any mail that you have received from the IRS or DOR regarding prior year returns