



Pocono Mountains United Way

## **What to bring checklist:**

- Social Security card and S.S. Cards for all Dependents in the tax filing
- Photo IDs for Self and Spouse if filing jointly – Driver’s License, State Photo ID, or Passport
- Last year’s tax returns
- W-2 forms for all jobs held
- All 1099 forms, SSA 1099
- Voided Check
- Anything that says “This is important for your taxes” or “Tax document”
- Forms 1098-T for anyone on your tax return who is in a post-secondary college
- Receipts for donations to charitable organizations
- Detailed childcare expenses and tax ID number of provider(s)
- Form 1095 A if you received one
- Mortgage interest statement and property tax receipts

**NOTE: Both Taxpayer and Spouse must come to the appointment if filing a joint return.**