

Required Documents

- ☐ Photo ID (driver's license, state photo ID or other government issued identification that includes a photo)
- ☐ Social Security Cards or Individual Taxpayer Identification Number (ITIN) Cards/Letters for each person on the tax return
- ☐ 1095-A, if taxpayer purchased health insurance through Access Health CT
- ☐ Copy of 2023 Tax Year Return
- ☐ Bank account number and routing number for direct deposit

*** If Married Filing Jointly, spouse **must** be present to sign e-file authorization form

Income Documents

- ☐ Wages or Salary? (Form W-2) If yes, how many jobs did you have last year?__
- ☐ Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
- ☐ Refund of state/local income taxes? (Form 1099-G)
- ☐ Alimony income or separate maintenance payments?
- ☐ Self-Employment income? (Forms 1099-MISC, 1099-NEC, 1099-K, cash, digital assets, or other property or services) - **(See Self-Employment Checklist)**
- ☐ Income (or loss) from the sale or exchange of stocks, bonds, digital assets or real estate? (including your home) (Forms 1099-S, 1099-B)
- ☐ Disability income? (such as payments from insurance, or workers comp) (Forms 1099-R, W-2)
- ☐ Retirement income or payments from pensions, annuities, and or IRA? (Form 1099-R)
- ☐ Unemployment Compensation? (Form 1099-G)
- ☐ Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
- ☐ Income (or loss) from rental property?
- ☐ Other income? (gambling, lottery, prizes, awards, jury duty, digital assets, Sch K-1, royalties, foreign income, etc.)

Adjustments/Deductions

- ☐ Student loan interest payments (1098-E)
- ☐ Educator Expenses for K-12 (receipts)
- ☐ Medical & Dental (including insurance premiums)
- ☐ Mortgage Interest (Form 1098)
- ☐ Taxes Paid (State, Real Estate, Personal Property, Sales)
- ☐ Charitable Contributions
- ☐ Contributions or repayments to a retirement account? (IRA, Roth IRA, 401K, etc.)

Child Care Expenses

- ☐ Child Care Statement from the Provider or the below information
 - Amount Paid to Provider _____
 - Provider's SSN or EIN _____
 - Provider's Name _____
 - Provider's Address _____

Higher Education Expenses

- ☐ Student tuition and book expenses (1098-T, account statement, receipts for books and supplies); total spent in the following categories:

Expenses	Amount
1. Tuition	_____
2. Fees	_____ Academic fees only
3. Books	_____ Only course required books
4. Supplies	_____ Only course required supplies
5. Room & board	_____ <i>Not a qualified expense</i>