



TAX INCORPORATED

Available • Accurate • Accountable

Personal Information

- 1 Government-issued photo ID
- 2 Social Security card or ITIN (you, spouse, dependents)
- 3 Last year's tax return (if available)
- 4 Bank routing & account number for direct deposit

Income Documents

- 1 W-2s
- 2 1099-NEC / 1099-MISC
- 3 1099-G (unemployment)
- 4 1099-INT / 1099-DIV
- 5 Cash or side income

Dependents & Household

- 1 Proof of residency
- 2 Childcare provider information & EIN
- 3 Custody agreement (if applicable)

Self-Employed / Business Owners

- 1 Business income records
- 2 Business expenses & receipts
- 3 Mileage log
- 4 Home office details

Upload your documents securely and we will contact you for review.
www.taxincorp.com