Prior to seeing the counselor for your tax preparation, would you please do the following?

1. Remove all documents from the envelopes.
2. Put your tax documents in the following order:
    a. **Current Year Identity Theft Pin Letter and Number (if you have one)**
    b. **1099-SSA statement** (or social security card**) FIRST**
    c. **1099-Rs** (IRA/Pension Distributions, Railroad Retirement)
    d. **W-2s (wages and salary)**
    e. **1099-INT, 1099-DiV (interest and dividends)**
    f. **1099-B Brokerage Statements (keep them in order)**
    g. **1099-MISC, 1099-NEC, 1099-G**
    h. **Schedule K-1 (**we can't do all K-1s). Please ask us.
    i. **Schedule C worksheet** (self-employment cash income/expenses)
    j. **Other income** (gambling winnings, other compensations, cancellation of debt)
    k. **Itemized deductions (Ask for Itemized deduction sheet)**
    l. **Last Year's Tax Return**
    m. **Voided check** if you want direct deposit or withdrawal
    n. **Death Certificates** (as appropriate)

Please keep your Driver's license or ID available for the tax counselor and quality reviewer.

One person will need to remain in the tax preparation room.

Please allow 2-3 hours total time for tax preparation.

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