

SAL'S TAX PREPARERS INC.

Documents Required For Following Income Tax Credits

Please bring this check list with you to appointment

Circle all items brought to Appointment: (please bring copies for appointment)

(Bring at least 3 items)	(Bring at least 3 items)	(Bring at least 2 items)	(Answer all Questions)
<u>EIC</u>	<u>CTC</u>	<u>AOTC</u>	<u>HOH</u>
Social Security Cards	Social Security Card	*1098-T	Unmarried
Birth Certificates	Birth Certificates	Transcript of Account	Legally Separate >1/2yr
Marriage Certificate	Marriage Certificate	Billing and payment	½ Cost of Keep Home
Divorce Certificate	Divorce Certificate	Receipts for books	Qualif. Person Living with you >1/2 yr
School Statements	School Statements	Receipts form School	
Doctors Statements	Doctors Statement		
Lease showing resident	Lease showing residents		
Court Records	Court Records		
Placement Agency Info	Placement Agency Info		

***Your 1098-T could be incorrect. Please bring a transcript of payment from the Educational Institution showing payment. Note: The Educational Institutions are not required, as of now, to put on the 1098-T Payment information. Therefore, you must provide proof of payment.**

The items I have circled above were brought to my Tax Appointment: I refuse to leave any documents with the Tax Preparer.

Sign Name

Date