

I'm Employed



Document Collection

- Personal Identification:** Have your driver's license or state ID ready.
- Social Security Cards:** For yourself and any dependents.
- W-2 Form:** Your annual earnings and tax withholding from your employer.
- 1099 Forms:** For additional income such as interest (1099-INT), dividends (1099-DIV), freelance or contract work (1099-NEC or 1099-MISC).
- Bank Statements:** Useful for identifying potential deductions.
- Previous Year Tax Return:** Important for reference.

Health Insurance Forms

- Form 1095-A (Marketplace Coverage):** If you purchased health insurance through the Marketplace.
- Form 1095-B (Health Coverage):** Details about your health insurance coverage, if provided.
- Form 1095-C (Employer-Provided Insurance):** If your employer provides your health insurance.

Taxpayer Intake Form

- Complete the Intake Form:** [Access the Form](#)
Mobile App for Convenience:
 - **Android:** [Google Play](#)
 - **iOS:** [App Store](#)

Document Collection

- Are You a Student?** Include 1098-T for tuition, 1098-E for student loan interest.
- Household Employer?**
[Access the Form](#)
- Provided Household Help?**
[Access the Form](#)
- Have Dependents in Someone's Care?** Complete the [Dependent Care Form](#) for deductions.
- Side Hustle or Contract Work?** Remember your 1099 forms. Complete the [Schedule C Intake Form](#) for additional business income.

Notes

Don't forget to share our services with your friends and family. Ask us about our referral program and get \$75 per referral!