

# 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.

## 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.

## 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.

## Notes

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

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## Taxpayer Intake Form

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

