

DOCUMENTS NEEDED FOR 2020 TAX RETURNS

1. Form 1444 – Economic Impact Payment Received. Also amounts received on the first and second stimulus. If you do not let us know what was received, we must assume you received the max stimulus each time
2. Form 1095A – Health Insurance Marketplace Statement
3. Send a copy of the front and back of your driver's license (also for your spouse if filing jointly)
4. Provide your bank routing and account numbers for the direct deposit of refunds
Provide bank info for the automatic withdrawal of any state corporate tax due