

1. Military issued identification for yourself and your spouse and a completed DA Form 2465.
2. Social security cards or individual taxpayer identification notices/cards for you, your spouse, and/or dependents.
3. A copy of last year's tax return
4. All W-2's received for the 2020 tax year for you and/or your spouse. These are available online through your Defense Finance and Accounting Service MyPay account.
5. Child care expenses and provider information (name, address, and Employer Identification Number or Social Security Number)
6. Pension, retirement income - IRS Form 1099R
7. Interest and dividend income statements - Form 1099-INT and/or Form 1099-DIV
8. Sales of stock or bonds with cost basis and dates of transactions (preferable to bring financial institution issued tax record(s)). Assistance is limited to 10 transactions.
9. Non-employment compensation (if within scope) -- Form 1099NEC
10. State refund from previous year – 1099G
11. Social Security or unemployment income – 1099-SSA or 1099G
12. Information from other income(s)
13. Records of purchase or sale of home
14. Medical and dental expenses not covered by TRICARE or United Concordia
16. Real estate taxes—1098 and personal property taxes (auto sales document)
17. Cash and non-cash charitable donations (if itemizing deductions) – letter from religious institution
18. Mortgage or home equity loan interest paid - IRS Form 1098
19. Unreimbursed employment-related expenses
20. Educational expenses - IRS Form 1098E
21. Proof of account for direct deposit of refund - A voided check