**BE PREPARED TAX SERVICE**

**2618 Chichester Ave. 3 N. Five Points Rd**

**Upper Chichester, PA 19061 West Chester, PA 19380**

**484-816-0157 484-887-8345**

[**MYTAXES@BPTAXSERVICE.COM**](mailto:MYTAXES@BPTAXSERVICE.COM)

**Tax Items Needed to Complete Tax Return**

All new requirements to fulfill A.C.A., EITC & CTC requirements.

1. **Taxpayer Questionnaire**. Fully completed and signed by all taxpayers, including spouse. Located on Website at www.bptaxservice.com
2. **Identification for all taxpayers.** Both spouses. Driver’s License or State issued ID. Social Security Cards & Birth Certificates for all Children.
3. **Proof of Health Insurance.** Form 1095A, B, or C for **ALL** people listed on return including dependents!!
4. **All Income Statements.** I.E. W-2, 1099’s, etc. Paystubs and financial account statements forms are not acceptable.
5. **All Deduction Statements.** I.E. Charities (New Requirement: Must have proof or we can not deduct, no exceptions!), Mortgage interest, Real Estate taxes, College tuition 1098T, Daycare, etc.
6. **Dependents that file their own tax forms** but are dependent on your return. We must have a copy of their return to determine Premium Tax Credit for the Affordable Care Act (ACA).
7. **All other tax documents received by taxpayers. If not sure bring or ask us!**

**Documentation Needed:**

**Earned Income Tax Credit (EITC)**

**&**

**Child Tax Credit (CTC)**

Please provide one or more of the following documents for each child claimed on the tax return!

**Documents must contain child’s name and address where appropriate.**

\_\_\_\_ Birth Certificate.

\_\_\_\_ Social Security Card for Child.

\_\_\_\_ Placement agency statement.

\_\_\_\_ School records or statement.

\_\_\_\_ Medical records.

\_\_\_\_ Social service records or statement.

\_\_\_\_ Landlord or property management statement. (Indicating child lived with you.)

\_\_\_\_ Employer statement. (Indicating child lived with you.)

\_\_\_\_ Health care provider statement. (Indicating child lived with you.)

\_\_\_\_ Indian tribal official statement. (Indicating child lived with you.)

\_\_\_\_ Child care provider records.

**If Divorced or Legally Separated:**

Copy of divorce decree or separation agreement showing who has custody rights of child (ren).