

Important Information!

Documentation requirements have been increased for all refundable tax credits, which includes the EITC (Earned Income Tax Credit), Child Tax Credit (for children under the age of 17), and the AOTC (American Opportunity Tax Credit for the first 4 years of college undergraduate studies). **Before** we can prepare your return, you must provide the proper documentation in order to claim these credits. Examples of documentation for each credit are listed below.

EITC	CHILD TAX CREDIT	AOTC
Social security cards (required)	Social security cards (required)	Receipts from school to substantiate Form 1098-T
Birth Certificates (required)	Birth Certificates (required)	Loan disbursement schedules
Marriage Certificate	Marriage Certificate	Receipts for books
Divorce Decree	Divorce Decree	Receipts for course materials
School Statement	School Statement	Form 1098-T (required)
Doctor's Statement	Doctor's Statement	Billing and payment summary from the university (required)
Lease showing the residents of the household	Lease showing the residents of the household	
Court records	Court records	
Placement agency paperwork	Placement agency paperwork	
	Form 8832*	

*Unique to child tax credit. Form 8332 does not impact who can claim the child for EITC, but it does for the child tax credit.

For Self-Employed or Small Business, over →

Small Business

In addition, if you have a Small Business reported on Schedule C, you will be asked to fill out a questionnaire and supply documentation to substantiate your business, such as bank statements or advertising examples.

We will need 2 of the following items:

- Your Business License
- Forms 1099-Misc
- Record of gross income and expenses
- Your summary of income and expenses
- Bank Statements for your business
- A profit and loss statement from your computer software package (such as Quicken, QuickBooks, etc)