

DOCUMENTATION CHECKLIST

(PLEASE BRING THE FOLLOWING PROOF OF DOCUMENTATION)

Information Worksheet - (Found on Our Website: www.ubiquity1040.com)

A Government Issued I.D. - (Example: Drivers License, State I.D. Card, Passport)

Copy of SOCIAL SECURITY CARDS for Taxpayer and Dependents

Copy of BIRTH CERTIFICATES for Dependents ONLY

Copy of Last PAYCHECK STUBS Issued In December Which Has the YTD Wages

W2 - Annual Wages Earned

W2G - Gambling Winnings

1098 - Mortgage Interest Statement

1098-T - Educational Expenses

1099-B - Stock Sold Income

1099-G - Unemployment Income

1099-NEC - Self Employment Income

1099-R - Retiree Income/401K

SSA-1099 - Social Security Benefit Statement

ANNUAL Property Mortgage Insurance

ANNUAL Property Taxes

LOAN DOCS FOR ANY REFINANCING OR NEW HOME PURCHASES

**IF THIS IS YOUR FIRST TIME WITH US, PLEASE PROVIDE A COPY OF YOUR PRIOR YEAR
TAX RETURN**