



Documents you need to file taxes.

Personal information



- ☐ Social Security number or tax ID number
- ☐ Spouse's full name, Social Security number or tax ID number, and date of birth
- ☐ Identity protection PIN (if the IRS has issued one to you, your spouse, or your dependent)
- ☐ Routing and account numbers to receive your refund by direct deposit or to pay your balance due (if you choose)

Dependent(s) information



- ☐ Dates of birth and Social Security numbers or tax ID numbers
- ☐ Child-care records (including the provider's tax ID number), if applicable
- ☐ Income of dependents and other adults in your home
- ☐ Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)



Income sources



Rental income

- ☐ Records of income and expenses
- ☐ Rental asset information (cost, date placed in service, etc.) for depreciation
- ☐ Record of estimated tax payments made (Form 1040-ES)

Retirement income

- ☐ Pension, IRA, or annuity income (1099-R)
- ☐ Traditional IRA basis (e.g., amounts you contributed to the IRA that were already taxed)
- ☐ Social Security or RRB income: SSA-1099, RRB-1099

Savings and investments or dividends

- ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sales of stock or other property (1099-B, 1099-S)
- ☐ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- ☐ Health Savings Account (HSA) and long-term care reimbursements (1099-SA or 1099-LTC)
- ☐ Expenses related to your investments
- ☐ Record of estimated tax payments made (Form 1040-ES)
- ☐ Transactions involving cryptocurrency

Employed

- ☐ Form W-2

Unemployed

- ☐ Unemployment (1099-G)

Self-employed

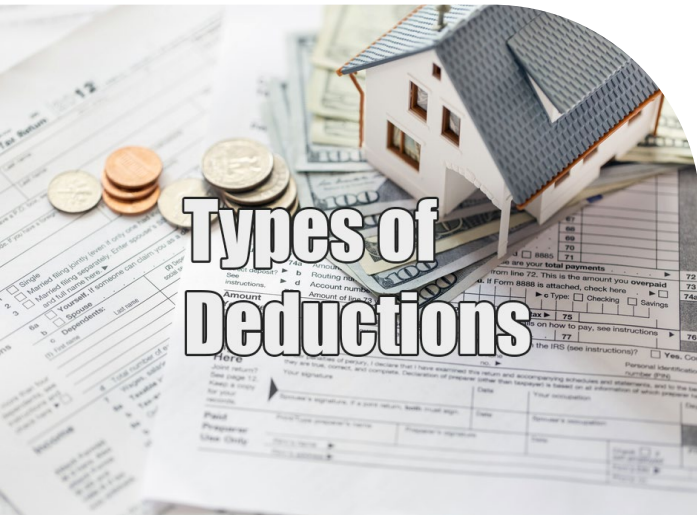
- ☐ Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or 1099-NEC
- ☐ Records of all expenses – check registers, credit card statements, and receipts
- ☐ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ☐ Home office information, if applicable
- ☐ Record of estimated tax payments made (Form 1040-ES)

Other income and losses

- ☐ Payment card and third-party network transactions (1099-K)
- ☐ Gambling income (W-2G or records showing income, as well as expense records)
- ☐ Jury duty records
- ☐ Hobby income and expenses
- ☐ Prizes and awards
- ☐ Trust income
- ☐ Royalty income (1099-MISC)
- ☐ Any other 1099s received
- ☐ Record of alimony paid or received with ex-spouse's name and SSN
- ☐ State tax refund



Types of deductions



Homeownership

- ☐ Forms 1098 or other mortgage interest statements
- ☐ Real estate and personal property tax records
- ☐ Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
- ☐ All other 1098 series forms

Charitable donations

- ☐ Cash amounts donated to houses of worship, schools, or other charitable organizations
- ☐ Records of non-cash charitable donations
- ☐ Amounts of miles driven for charitable or medical purposes

Medical expenses

- ☐ Amounts paid for healthcare, insurance
- ☐ Amounts paid to doctors, dentists, and hospitals
- ☐ Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer provided plan

Health insurance

- ☐ Form 1095-A if you enrolled in an insurance plan through the Marketplace

K-12 educator expenses

- ☐ Receipts for classroom expenses (for educators in grades K-12)

Child-care expenses

- ☐ Fees paid to a licensed day-care center or family day-care center for care of an infant or preschooler
- ☐ Amounts paid to a babysitter or care provider for your child (under age 13) while you work
- ☐ Expenses paid through a dependent care flexible spending account at work

Educational expenses

- ☐ Forms 1098-T from educational institutions
- ☐ Receipts that itemize qualified educational expenses
- ☐ Records of any scholarships or fellowships you received
- ☐ Form 1098-E if you paid student loan interest

State and local taxes

- ☐ Amount of state and local income or sales tax paid (other than wage withholding)
- ☐ Invoice showing amount of vehicle sales tax paid and/or personal property tax on vehicles

Retirement and other savings

- ☐ Form 5498-SA showing HSA contributions
- ☐ Form 5498 showing IRA contributions
- ☐ All other 5498 series forms (5498-QA, 5498-ESA)

Federally declared disaster

- ☐ Proof of city or county you lived, worked, or had property in
- ☐ Records to support property losses (appraisal, clean-up costs, etc.)
- ☐ Records of rebuilding or repair costs
- ☐ Insurance reimbursements or claims to be paid
- ☐ FEMA assistance information

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