



## Tax Document Checklist

### Personal Information

- **Identification Details:**
  - ✓ Social Security numbers (for you, your spouse, and dependents)
  - ✓ Dates of birth for all individuals on the return
- **Banking Information:**
  - ✓ Bank account and routing numbers (for direct deposit/refund)

### Income Documents

- **Employment Income:**
  - ✓ W-2 forms from all employers
- **Self-Employment / Business Income:**
  - ✓ 1099-NEC forms (nonemployee compensation)
  - ✓ Detailed income records (invoices, sales receipts)
  - ✓ Business expense documentation (receipts, logs)
- **Investment Income:**
  - ✓ 1099-INT (interest income)
  - ✓ 1099-DIV (dividend income)
  - ✓ 1099-B (proceeds from stock sales or other investments)
  - ✓ Brokerage statements
- **Retirement Income:**
  - ✓ 1099-R (distributions from pensions, IRAs, or annuities)
- **Government Benefits:**
  - ✓ 1099-G (unemployment benefits or state tax refunds)
  - ✓ SSA-1099 (Social Security benefits)
- **Other Income:**
  - ✓ 1099-MISC (miscellaneous income)
  - ✓ W-2G (gambling winnings)
  - ✓ Rental income records
  - ✓ Other income statements or documentation



### **Deduction & Credit Documents**

- **Education Expenses:**
  - ✓ 1098-T (tuition statement)
  - ✓ 1098-E (student loan interest)
- **Homeownership:**
  - ✓ 1098 (mortgage interest statement)
  - ✓ Property tax statements
- **Medical & Health Expenses:**
  - ✓ Receipts and records for qualified medical expenses (if itemizing)
- **Charitable Contributions:**
  - ✓ Receipts or acknowledgment letters from charities
- **Other Deductions/Credits:**
  - ✓ Records for retirement contributions (IRA, HSA, etc.)
  - ✓ Child care expenses (including provider's tax ID)
  - ✓ Moving expense documentation (if applicable)
  - ✓ Records for casualty and theft losses
  - ✓ Documentation for any other credits (energy efficiency, adoption, etc.)

### **Health Insurance Information**

- **Coverage Forms:**
  - ✓ 1095-A (if you received health insurance through the Marketplace)
  - ✓ 1095-B or 1095-C (if provided by your employer or insurer)
- **Additional Coverage Information:**
  - ✓ Any other documentation proving your health insurance coverage

### **Additional Supporting Documents**

- **Previous Tax Return:**
  - ✓ A copy of last year's tax return (for reference)
- **IRS Correspondence:**
  - ✓ Any notices or letters from the IRS
- **Estimated Tax Payments:**
  - ✓ Records of quarterly estimated tax payments (if applicable)
- **Home Office/Vehicle Records (if applicable):**
  - ✓ Home office expense records and/or mileage logs for business or medical purposes
- **Foreign Assets Reporting:**
  - ✓ Documentation related to foreign bank accounts (FBAR) if applicable