

# Your Tax Document Checklist

Please note, this is not an exhaustive list, just common tax documents. Every situation is different – if you're unsure whether to include something in your tax filing, consult a tax professional.

## Personal and Spouse Information

*Include all documents and information that apply:*

- Your Social Security Number (SSN) or tax ID number
- Your spouse's full name and SSN or tax ID number
- Your unexpired, government-issued photo ID
- Birth dates for you and your spouse
- Tax returns from the previous two years, if you have them
- Identity Protection PIN (IP PIN), if you have one

## Dependent Information

*Include all documents and information that apply:*

- Social Security Numbers or tax ID numbers for any dependents
- Birth dates for any dependents
- Childcare records (including provider's tax ID number) if applicable
- Form 8332 when the child's custodial parent is releasing their right to claim a child to the noncustodial parent (if applicable)

## Income Documents

*Include all documents that apply:*

### Employment Income

- Form(s) W-2 for all jobs the previous year

### Unemployment Income

- Form 1099-G for unemployment benefits

### Self-Employment Income

- Forms 1099-NEC and/or 1099-K
- Records of any income not reported on 1099 forms
- Documents of all expenses – credit card statements, receipts, etc.
- Records of estimated tax payments made – Form 1040-ES
- Home office information, if applicable
- Business-use asset information (cost, date placed in service, etc.) for depreciation

### Retirement Income

- Form 1099-R for Pension, IRA, and/or annuity income
- SSA-1099 for Social Security benefits
- Form 8606 for Traditional IRA basis showing amounts already taxed

### Other Sources of Income

- Form 1099-G for a refund of state/local income taxes
- Form 1098-T for scholarships and/or fellowships
- Income or loss from the sale of stocks, bonds, or real estate
- Income or loss from a rental property
- Alimony received
- Statements for prizes of lottery and/or gambling winnings
- Cost of all cryptocurrencies, NFTs, and other similar types of income sales
- Forms 1099-INT/1099-DIV for interest and dividend statements
- Records for any other income

## Expense Documents

*You may be able to claim tax deductions for some expenses. These deductions reduce the total income you are taxed on. Include all documents that apply:*

- Retirement contributions, including 401(k) and/or IRA
- State and local taxes you've paid
- Form 1098 or other mortgage interest statements
- Real estate and personal property tax records
- College tuition (Form 1098-T) and student loan statements (Form 1098-E)
- Cash amounts donated to religious organizations, schools, and other charitable organizations
- Records of non-cash charitable donations
- Amount of miles driven for charitable purposes
- Childcare expenses, including payment records or receipts and provider's name, address, and federal tax ID number
- Medical and dental bills
- Records for supplies used as an educator

## Other Tax Documents or Notices

- Form 1095-A if you have coverage through the Health Insurance Marketplace
- Any documents from the IRS, Health Insurance Marketplace, your state tax agency, or anything that says "IMPORTANT TAX DOCUMENT"
- Insurance reimbursements or claims to be paid
- Form 5498-SA showing HAS contributions