



What do I need to file my taxes?

The documents you need for tax prep depends on your situation. To help you prepare for your tax appointment or walk in, we've created a checklist to help you know what forms to bring

PERSONAL INFORMATION

All taxpayers will need the following to do their taxes:

- Social security card or tax ID number;
- Your spouse's social security card or tax ID Number;
- Identity Protection PIN (IP PIN), if one has been issued to you, or your dependent by the IRS;
- Routing and account numbers to receive your refund by direct deposit.
- Marriage Certificate if it is your first time filing jointly with our office;
- Foreign reporting and residency information - if applicable

DEPENDENT INFORMATION

Parents and caregivers should gather this information as we need this information every year.

- Social Security Cards for each dependent
- Birth Certificates for each dependent
If you are claiming a dependent who is not your son or daughter, you must provide additional birth certificates to verify your relationship to the child. For example, if you are claiming your nephew, you will need to submit your nephew's birth certificate, your sibling's (brother or sister) birth certificate, and your own birth certificate to establish the family connection.

- Proof of Residency Documentation
In order to ensure compliance with IRS regulations, we kindly request that you provide documentation that satisfies ALL four of the following conditions:
 - 1) Taxpayer's Name
 - 2) Dependent's Name
 - 3) Matching Address
 - 4) Date for Applicable Tax Year (must show at least the last 6 months of year)

Our office will NOT transmit returns without the necessary dependent documentation, as outlined by Form 886-H-DEP and other relevant IRS publications. Below are some examples:

- School Records (Student Demographics) - Current School Year
- Social Service Records (SNAP Benefits, WIC, etc).
- Medical Records (We cannot accept Immunizations Records)
- Healthcare Provider Statement (Medicaid, Private Insurance, etc.)
- Daycare Records (Must be on official letterhead)
- Landlord/Property Manager Statement (Must be on official letterhead).
- Place of Worship Statement (Must be on official letterhead).
- Indian Tribal Official Statement
- Address Verification from Chapter House
- Employer Statement (Must be on official letterhead).
- Childcare/Daycare records if applicable
- Income of dependents and of other adults in your home if applicable.
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you.

**SOURCES OF
INCOME**

Many of these forms may not be applicable to your tax return every year, but here are some common forms you can look out for.

Employed

- Form W2

Unemployed

- Form 1099-G

Self-Employed

- FORM 1099-NEC (Non-Employee Compensation)
- FORM 1099-MISC
- Schedule K1 — Partner's Share of Income, Deductions, credits, etc.
- Records of all income — paid invoices, etc.
- Records of all expenses — credit card statements, paid invoices, and receipts
- Business-use asset information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable
- Record of estimated tax payments made (Form 1040-ES)

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

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

Savings & Investments or Dividends

- 1099-INT, 1099-DIV, 1099-OID, Interest, dividend income
- 1099-B, 1099-S, Income from sales of stock or other property
- Dates of acquisition and records of your cost or other basis in property you sold
- 1099-SA or 1099-LTC, Health Savings Account and long-term care reimbursements
- Expenses related to your investments
- Record of estimated tax payments made (Form 1040-ES)
- Transactions involving cryptocurrency (Virtual currency)

Other Income & Losses

- 1099-K, Payment Card and Third Party Network Transactions
- Form W-2G, Gambling income
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trust income
- 1099-MISC, Royalty Income
- Any other 1099s received



TYPES OF DEDUCTIONS

The types of deductions you can take depend a lot on your life situation. It's likely you won't need all of the documents listed below for your taxes.

Home and Vehicle Ownership

- 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)
- Electric vehicle information

Charitable Donations

- Cash amounts donated to houses of worship, schools, 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, and to doctors, dentists, and hospitals
- Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer provided plan

Child Care Expenses

- Fees paid to a licensed day care center or family day care for care of an infant or preschooler
- Amounts paid to a baby-sitter or provider care of 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

K-12 Educator Expenses

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

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 & Other Savings

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