

# *Taxes Done Right*

## CHECKLIST

### HOUSEHOLD

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#### Head Of Household

- ☐ Driver's License, Id, or Passport
- ☐ Social Security Card
- ☐ Birth Certificate
- ☐ Date Of Birth

#### Spouse

- ☐ Driver's License, Id, or Passport
- ☐ Social Security Card
- ☐ Birth Certificate
- ☐ Date Of Birth

#### Dependents

- ☐ Birth Certificate
- ☐ Social Security Card
- ☐ Adoption or Proof of Custody (if applicable)
- ☐ Childcare provider info (name, address, tax ID/SSN)
- ☐ Education expenses (tuition, school fees)
- ☐ Dependent care expenses for qualifying credit

### DEDUCTION DOCUMENTS

- ☐ Mortgage interest statement (1098)
- ☐ Property tax statements
- ☐ Student loan interest (1098-E)
- ☐ Medical and dental expenses
- ☐ Charitable donation receipts
- ☐ Childcare costs & provider info (for Child/Dependent Care Credit)
- ☐ Education expenses (1098-T)
- ☐ Retirement contributions (IRA, 401(k))
- ☐ Investment-related expenses

### INCOME DOCUMENTS

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- ☐ W-2 forms
- ☐ 1099 forms (NEC, MISC, INT, DIV, B, R, G, K)
- ☐ Rental income statements
- ☐ Alimony received
- ☐ Business/freelance income records

#### Self-Employment or Business

- ☐ Profit & loss statements
- ☐ Receipts for business expenses (supplies, travel, home office, equipment)
- ☐ Mileage logs for business use of vehicle

### HEALTH INSURANCE

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- ☐ Form 1095-A (Marketplace insurance)
- ☐ Form 1095-B or 1095-C (other coverage)