

Taxes Done Right

CHECKLIST

HOUSEHOLD

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

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

HEALTH INSURANCE

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

Self-Employment or Business

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