

Samuel Tax & Services

WHAT I NEED TO FILE MY TAXES

Personal Information	Dependent(s) Information
<ul style="list-style-type: none">• Your social security number• Your spouse's full name and social security number	<ul style="list-style-type: none">• Dates of birth and social security numbers• Childcare records (including the provider's tax ID number) if applicable• Income of other adults in your home• Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)• Copy of Lease
Sources Of Income	Types Of Deductions
<ul style="list-style-type: none">• Forms W-2• Unemployment, state tax refund (1099-G)• Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099s• Records of all expenses — check registers or credit card statements, 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• Savings & Investments or Dividends• Other Income & Losses	<ul style="list-style-type: none">• Home Ownership• Charitable Donations• Medical Expenses• Health Insurance• Childcare Expenses• Educational Expenses• K-12 Educator Expenses• State & Local Taxes