

Personal Information

- ☐ Valid ID
- ☐ SSN/ITIN for you, spouse and your dependents
- ☐ Dependent(s) Information (DOB, SSN/ITIN)
- ☐ Childcare records (including the provider's tax ID number) if applicable
- ☐ Income of other adults in your home
- ☐ Form 8332 for the noncustodial parent (if applicable)
- ☐ Sources of Income
- ☐ Forms W-2
- ☐ Unemployment, state tax refund (1099-G)
- ☐ 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)
- ☐ All other 1098 series forms
- ☐ 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, hospitals
- ☐ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- ☐ Childcare Expenses
- ☐ Fees paid to a licensed day care center or family day care for care of an infant or preschooler
- ☐ Wages paid to a baby-sitter
- ☐ Don't include expenses paid through a 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 & Local Taxes
- ☐ Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- ☐ Invoice showing amount of vehicle sales tax paid

If You Have Business:

- ☐ Schedules K-1
- ☐ Forms 1099-MISC
- ☐ Records of all expenses — bank statements, receipts, invoices
- ☐ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ☐ Home office information
- ☐ Record of estimated tax payments made (Form 1040-ES)
- ☐ Rental Income

- ☐ Records of all business income
- ☐ Rental asset information (cost, date placed in service, etc.) for depreciation
- ☐ Record of estimated tax payments made (Form 1040–ES)

Retirement Income

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

Retirement & Other Savings

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

Savings & Investments or Dividends

- ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Income from sales of stock or other property (1099-B, 1099-S)
- ☐ Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- ☐ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- ☐ Expenses related to your investments
- ☐ Transactions involving cryptocurrency (Virtual currency)

Other Income & Losses

- ☐ Gambling income (W-2G or records showing income, as well as expense records)
- ☐ Jury duty records
- ☐ Hobby income and expenses
- ☐ Prizes and awards
- ☐ Royalty Income 1099–Misc.
- ☐ Any other 1099s received
- ☐ Record of alimony paid/received with ex-spouse's name and SSN

Federally Declared Disaster

- ☐ City/county you lived/worked/had property in
- ☐ Records to support property losses (appraisal, clean up costs, etc.)
- ☐ Records of rebuilding/repair costs
- ☐ Insurance reimbursements/claims to be paid
- ☐ FEMA assistance information