

- ★ Last year's tax return
- ★ Drivers License (front and back if copy) for anyone listed as a Taxpayer or Spouse (including dependent children who are filing their own return)
 - ★ Dependents social security cards and birth certificates
 - ★ Wage statement - W-2
 - ★ Retirement income from pension or IRA - 1099-R
 - ★ Out of pocket IRA contributions
 - ★ Social security statement - 1099-SSA
 - ★ Unemployment compensation - 1099-G
- ★ Interest and dividend statements - 1099-INT/1099-DIV
 - ★ Sales of stocks and bonds - 1099-B
- ★ Self employment income and expenses - 1099-NEC
 - ★ Rents and/or commissions - 1099-MISC
 - ★ Rental property income and expenses
- ★ Lottery and gamblings winnings and losses - W2-G
- ★ Income from partnerships, corporations, estates, and/or trusts - K-1
- ★ Alimony paid or received (only for divorce decrees in place before 12/31/2018)
 - ★ Mortgage and/or home equity loan interest - 1098
 - ★ Real estate or personal property taxes paid
 - ★ Medical and dental expenses
- ★ Unreimbursed work expenses and mileage (for State purposes only)
 - ★ Gifts to charity by cash and/or check as well as goods
 - ★ Education expenses - 1098-T or 1099-Q
 - ★ Educational savings contributions - NY529 Plans
 - ★ Child care expenses and provider information
 - ★ Estimated federal and state taxes paid
- ★ 1095-A statement for healthcare if purchased through the marketplace