Tax Document Checklist

Basic Information

- ☐ **Driver's License or State ID** (for you and your spouse, if applicable)
- ☐ **Social Security Numbers (SSN)** or **Individual Taxpayer Identification Numbers (ITIN)** for everyone listed on the return (self, spouse, dependents)
- ☐ **Identity Pin Protection Number**
- ☐ **Bank Routing and Account Numbers** (for direct deposit or direct debit)

Income Documents

- ☐ **W-2 Forms** (from all employers)
- ☐ **1099 Forms** (if applicable):
    - ☐ **1099-NEC** (non-employee compensation)
    - ☐ **1099-MISC** (miscellaneous income)
    - ☐ **1099-INT** (interest income)
    - ☐ **1099-DIV** (dividends)
    - ☐ **1099-G** (unemployment or other government benefits)
    - ☐ **1099-R** (retirement income or distributions)
    - ☐ **1099-K** (third-party payment networks)
    - ☐ **1099-B** (stock or investment sales)
- ☐ Self-Employment Income Records (e.g., invoices, profit/loss statements)
- ☐ Rental Property Income and Expenses
- ☐ Unemployment Benefits Statement

Health Insurance Documents

- ☐ **Form 1095-A** (if you had marketplace coverage)
- ☐ **Form 1095-B or 1095-C** (if you had employer or other coverage)
- ☐ **Health Savings Account (HSA)** Documents:
    - ☐ Contribution Statement (Form 5498-SA)
    - ☐ Distribution Statement (Form 1099-SA)
- ☐ Out-of-Pocket Medical and Dental Expenses (e.g., copays, prescriptions, deductibles, premiums)

Deductions and Credits

- ☐ **Mortgage Interest Statement (Form 1098)**
- ☐ **Property Tax Receipts**
- ☐ **Charitable Contribution Receipts** (cash and non-cash donations)
- ☐ **First-Time Homebuyer Credit Information**
- ☐ **Childcare Expenses** (provider name, address, and Tax ID/SSN)
- ☐ **Education Expenses**:
  - ☐ **1098-T** (tuition payments)
  - ☐ **1098-E** (student loan interest)
- ☐ **Retirement Contributions** (e.g., IRA, 401(k) statements)
- ☐ **Energy-Efficient Home Improvement Receipts** (for applicable tax credits)
- ☐ **Vehicle Registration Payments** (if deductible in your state)
- ☐ **State and Local Taxes Paid** (prior-year taxes or estimated tax payments)

Investments and Stock Transactions

- ☐ Year-End Statements from Brokerage Accounts
- ☐ **1099-B** (capital gains and losses from stock/bond sales)
- ☐ Documentation of Stock Splits, Dividends, or Mergers
- ☐ Cryptocurrency Transactions (if applicable)

Dependents and Family Documents

- ☐ **Social Security Numbers (SSN)** for Dependents
- ☐ Proof of Relationship (for new dependents)
- ☐ Adoption Expenses (if applicable)

Additional Items (If Applicable)

- ☐ **Prior Year Tax Return**
- ☐ Legal Agreements (alimony, child support, or tax-related settlements)
- ☐ Business Income and Expenses:
  - ☐ Profit/Loss Statements
  - ☐ Expense Receipts (e.g., travel, equipment, supplies)
  - ☐ Mileage Logs (for business use of vehicles)
- ☐ Rental Property Documents (income and related expenses)