

What Do I Need to File My Taxes?

**Current Identification Numbers are mandatory items on your checklist.
All taxpayers will need the following to do their taxes.**

- Your social security number or ID number
- Your spouse's full name, social security number or tax ID number, and date of birth.
- Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS.

Acceptable forms of Identification:

- Passport (stand-alone document) *
- National identification card (must show photo, name, current address, date of birth, and expiration date)
- U.S. driver's license
- Civil birth certificate (required for dependents under 18 years of age)
- Foreign driver's license
- U.S. state identification card
- Foreign voter's registration card
- U.S. military identification card
- Foreign military identification card
- Visa
- U.S. Citizenship and Immigration Services (USCIS) photo identification.
- Medical records (dependents only - under 6).
- School records (dependents only - under 14, under 18 if a student).

Some of the items below may not apply to your tax filing situation.

- Dependent dates of birth and social security numbers or tax ID numbers.
- Income of dependents and 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).
- Employed Forms W-2.
- Unemployed Unemployment (1099-G).
- Self-employed Forms 1099, Schedules K-1.
- Income records to verify amounts not reported on 1099- MISC or new 1099-NEC.
- 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 (total sq feet of home and office space).
- Rental Income Records of income and expenses.
- Rental asset information (cost, date placed in service, etc.) for depreciation.
- Record of estimated tax payments made (Form 1040-ES
- 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 (SSA-1099, RRB-1099)
- 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.
- Record of estimated tax payments made (Form 1040-ES) •
- Transactions involving cryptocurrency (Virtual currency)
- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trust income Royalty income
- 1099-MISC Any other 1099s received
- Record of alimony paid/received with ex-spouse's name and SSN.
- State tax refund
- 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.
- 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.
- Amounts paid for healthcare, insurance, and to doctors, dentists, and hospitals.
- Health Insurance Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange).
- Amounts paid to a baby-sitter or provider of care of your child under age 13 while you work or Childcare records (including the provider's tax ID number, address, and phone number).
- Expenses paid through a dependent care flexible spending account at work.
- 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 and Local Taxes.
- Amount of state and local income or sales tax paid (other than wage withholding).
- Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles Form 5498-SA showing HSA contributions.
- Form 5498 showing IRA contributions All other 5498 series forms (5498-QA, 5498-ESA).
- 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.
- Check the FEMA website (www.fema.gov) to see if your county has been declared a federal disaster area.
- Routing and account numbers to receive your refund by direct deposit or pay your balance due if you choose.
- Copy of prior year tax return (1st 2 pages).