WHAT DO YOU NEED TO FILE YOUR TAXES?

What you need to file your taxes varies depending on your situation. Use the checklist below to find the tax documents and forms you'll need to get started.

PERSONAL INFORMATION	
☐	Social security number or tax ID number
☐	**Spouse Information**: Full name, social security number or tax ID number, date of birth
☐	**Stimulus**: Stimulus payment amount. The stimulus is referred to as "economic impact payment (EIP). You may have an IRS Notice 1444 or other records showing this amount
☐	**Identity Protection PIN** – if applicable. Provide PINs for those that have been issued to you, your spouse, or your dependent(s)
☐	**Routing and account numbers** to receive a refund or pay a balance due - for direct deposit/debit purposes
DEPENDENT(S) INFORMATION	
☐	Dates of birth and social security numbers (or tax ID numbers)
☐	Childcare records (including the provider's tax ID number) - if applicable
☐	The income of dependents and of other adults in your home
☐	If applicable, form 8332 - which states that the child's custodial parent is releasing their right to claim a child to the noncustodial parent
SOURCES OF INCOME	
☐	If **employed**, forms W-2
☐	If **unemployed**, unemployment (1099-G)
☐	If **self-employed:** ● 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) ● Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or new 1099-NEC
☐	If **retirement income**: ● Pension/IRA/annuity income (1099-R) ● Traditional IRA basis (i.e., amounts you contributed to the IRA that was already taxed) ● Social security/RRB income (SSA-1099, RRB-1099)
☐	If **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)
☐	**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 bases 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)

☐	**Other Income & Losses:** ● Sales of stock, land, etc., for capital gains (Form 1099-B) ● Sale of real estate (Form 1099-S) ● 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
DEDUCTIONS, EXPENSES	
☐	**Home Ownership:** ● Home mortgage interest from Form 1098 ● Home second mortgage interest paid ● 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
☐	**Medical Expenses** ● Medical expenses for family ● Medical insurance paid ○ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange) ● Prescription medicines and drugs ● Doctor and dentist payments ● Hospital and nurse payments ● Tax-deductible miles traveled for medical purposes
☐	**State & Local Taxes** ● State income taxes paid with last year's return (if claiming itemized deductions) ● State sales tax paid (other than wage withholding) ● Local income taxes paid with last year's return (if claiming itemized deductions) ● Local sales tax paid (other than wage withholding) ● Invoice showing amount of vehicle sales tax paid and/or personal property tax on vehicles
☐	**Charitable Donations** ● Cash amounts donated to houses of worship, schools, other charitable organizations ● Records of non-cash charitable donations. (Includes fair market value) ● Unreimbursed expenses related to volunteer purpose ● Amounts of miles driven for charitable or medical purposes
☐	**Casualty and Theft Losses** ● Casualty and theft loss records and documents
☐	**Childcare Expenses** ● Fees paid to a licensed daycare center or family daycare for care of an infant or preschooler ● Amounts paid to a baby-sitter or provider care of your child under age 13 while you work ● Expenses paid through a dependent care 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)
☐	**Retirement & Other Savings** ● Form 5498-SA showing HSA contributions ● Form 5498 showing IRA contributions ● All other 5498 series forms (5498-QA, 5498-ESA)
☐	**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
☐	**Other** ● Unreimbursed Expenses Related to Your Job ● Miles Traveled Related to Your Job ● Union and Professional Dues ● Investment Expenses ● Job-Hunting Expenses ● IRA Contributions ● Student Loan Interest Paid ● Moving Expenses ● Last Year’s Tax Return Preparation Fee
TAX CREDITS	
☐	Information and/or records to help us calculate your tax credits: ● Child tax credit ● **Child/dependent care provider address, id number, and amounts paid** ● Earned Income Tax Credit ● **Adoption – Expense information for adoption** ● Foreign taxes paid ● First time home buyer