

What to Bring to a Tax Appointment (Tax Checklist)

Here's a list of documents you need to help ensure you file taxes accurately.

Personal documents

Bring all documents below.

- **Photo ID**
- **Social Security Cards, Social Security Number verification letters, or Individual Taxpayer Identification Number assignment letters** for you, your spouse, and any dependents
- **Birthdates** for you, your spouse, and dependents on the tax return
- **Bank account and routing number** or a voided check for direct deposit of your refund
- **Previous year tax return**, if you have it

Income

Bring all documents that apply.

Employment Income

- **W-2 form(s)** for all jobs last year (your employer(s) will have sent you this by January 31st)

Self-Employment Income

- **1099-NEC and/or 1099-K**
- Records of income not reported on 1099 forms
- **Records of expenses** including receipts, credit statements, etc.
- **Record of estimated tax payments**

Retirement Income

- **SSA-1099 form** for Social Security benefits
- **1099-R** for pension/IRA/annuity income

Unemployment Income

- **1099-G** for unemployment benefits

Other sources of income

- **1099-G** for refund of state/local income taxes

- **1098-T** for scholarships/fellowships
- **1099-R** for disability income
- **Income or loss from the sale of stocks, bonds, or real estate**
- **Income or loss from rental property**
- **Alimony** received
- **Statements for prizes or lottery/gambling winnings**
- Interest and dividend statements from banks
- Records for any other income

Expenses

You may be able to claim tax deductions for some of the expenses you have. These deductions reduce the income you are taxed on. Bring documentation for all of the following expenses you have.

- **Retirement contributions**, including a 401(k) or IRA
- **State and local taxes** you've paid
- **Mortgage statements and property tax bills** if you are a homeowner
- **College tuition (1098-T) and student loan statements (Form 1098-E)**
- **Childcare expenses**, including payment records or receipts and provider's name, address, and federal tax ID number (either their Social Security Number or Employment Identification Number)
- **Receipts for charitable donations**
- **Medical and dental bills**
- **Records for supplies used as an educator**

Other Tax Documents or Notices

- **IRS Notice 1444, 1444-B, and/or 1444-C** for your Economic Impact Payments (also known as stimulus checks)
- **IRS Letter 6419** for your Child Tax Credit advance payments
- **Form 1095-A** if you had coverage through the Health Insurance Marketplace
- Documents from the IRS, Health Insurance Marketplace, your state tax agency, or anything that says "IMPORTANT TAX DOCUMENT"