

Tax Prep Checklist

Prepare for tax season like a pro by using this list to help you keep track of documents you may need to be able to file:

Personal Information

- Social Security Number or Tax ID Number
- Your spouse's SSN or Tax ID Number and date of birth if filing married/joint
- Information about your government stimulus payments, if applicable
- Your Identity Protection PIN, if one has been issued to you by the IRS
- Routing and account numbers to receive your refund via direct deposit

Dependent(s) Information

- Dates of birth and SSN or Tax ID Numbers
- Childcare records, including the provider's Tax ID Number, if applicable
- Income of dependents, if applicable
- Form 8332 showing that the child's custodial parent is releasing their right to claim the dependent to you, the non-custodial parent

Income

- W-2: employed
- 1099-G: unemployment received
- 1099: self-employed, rental income
- 1099-R: retirement income
- 1099-INT, 1099-OID, 1099-DIV, 1099-B, 1099-S, or 1099-SA: savings, investments, dividends income
- W-2G: gambling winnings

Deductions

- 1098: home ownership or other mortgage interest statements, real estate or personal property tax records, and receipts for energy-saving home improvements (solar panels, solar water heater, etc.)
- Records of charitable donations, including non-cash donations
- Records of medical expenses
- 1095-A: health insurance plan through the Marketplace Exchange
- Record of Childcare expenses, such as care through a family member or babysitter for a child under the age of 13 while you're working, or expenses paid through a dependent care flexible spending account at your work
- 1098-T and 1098-E: education expenses either from an institution or on student loan interest paid
- Record of state and local income or sales tax paid other than through your wages
- 5498-SA: showing contributions to a Health Savings Account (HSA)
- 5498: showing contributions to an Individual Retirement Account (IRA)