

What do I need to file my taxes?

The documents you need for tax prep depend on your situation. To help you prepare for your tax appointment or for filing your own taxes, we've created a checklist to help you know what forms to bring.

Personal Information

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

- ☐ Your social security number or tax ID number
- ☐ Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS
- ☐ Routing and account numbers to receive your refund by direct deposit or pay your balance due if you choose
- ☐ Foreign reporting and residency information - if applicable

Sources of Income

Many of these forms won't be needed to file taxes every year. For example, you will only receive the investment forms you may need to file your taxes if you had distributions or other activity.

Employed

- ☐ Forms W-2

Retirement Income

- ☐ 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)

Types of Deductions

The types of deductions you can take depend a lot on your life situation. It's likely you won't need all of the documents listed below for your taxes.

Home and Vehicle Ownership

- ☐ 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)
- ☐ Electric vehicle information
- ☐ All other 1098 series forms

Charitable Donations

- ☐ 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

Health Insurance

- ☐ Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

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

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