



The checklist below includes items you need to bring for us to help you prepare your tax return(s)

- Last year's tax return(s)
- Social Security cards or other official documentation for yourself and every individual on your return.
- Photo I.D. required for all taxpayers.
- Checkbook if you want to direct deposit any refund(s).

Income

- W-2 from each employer
- Unemployment compensation statements
- SSA-1099 Form showing the total Social Security benefits paid to you for the year, or Form RRB-1099, Tier 1 Railroad Retirement benefits
- 1099 Forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets
- 1099-R Form if you received a pension, annuity, or IRA distribution
- 1099-MISC Forms
- Information about other forms of Income
- State or local income tax refunds

Payments

All forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments)

Deductions

Most taxpayers have a choice of taking either a standard deduction or itemizing their deductions. If you have a substantial amount of deductions, you may want to itemize. You will need to bring the following information:

- 1098 Form showing any home mortgage interest
- A list of medical/dental expenses (including doctor and hospital bills and medical insurance premiums), a list of prescription medicines, costs of assisted living services, and bills for home improvements such as ramps and railings for people with disabilities
- Summary of contributions to charity
- Receipts or canceled checks for all quarterly or other paid tax
- Property Tax bills and proof of payment

Health Insurance

- 1095A Forms if you purchased insurance through the Marketplace (Exchange)
- 1095B/1095C Forms (if applicable)
- Any exemption correspondence from the Marketplace (if applicable)

Credits

- Dependent care provider information (name, employer ID, or Social Security number)
- 1098-T and 1098-E Forms (Tuition and Student Loan Interest)