



## Here is a sample of documents/information used in preparation of your tax return

### Taxpayer's Information

- Your previous year's tax return (for transfer of the carryforward information, if applicable)
- Your social security number (SSN) or tax ID number (ITIN)
- Your spouse's full name and SSN or ITIN if filing joint return
- Security PIN received from IRS, if applicable

### Information About Other People on Your Return

- Dates of birth and SSNs or TINs for your kids and/or dependents
- Childcare records (amount paid, provider's tax ID number or SSN if a person, address, phone number)
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent
- Amount of any alimony paid and ex-spouse's full name and SSN

### If you qualify for Earned Income Tax Credit (EITC)

- Proof of relationship for your qualifying child(ren)  
(Birth certificate, marriage certificate, adoption records, court records, etc.)
- Proof that your qualifying child(ren) lived with you more than half of the tax year  
(Medical records, school records, social services or placement agency records, landlord's statement etc.)

### Education Payments

- Forms 1098-T from educational institutions
- The amount of qualified educational expenses
- Records of any scholarships or fellowships you received (not listed on form 1098-T)
- Form 1098-E if you paid student loan interest

### Income Information

- Forms W-2
- Income of other adults in your home
- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Self-Employment Income
- Rental Property Income (income and expenses, rental asset information (cost, date placed in service) for depreciation)
- Retirement Income and Contributions:
  - Pension/IRA/annuity income (1099-R)
  - Social security/RRB income (1099-SSA, RRB-1099)
  - Form 5498 showing IRA contributions
  - Amounts you contributed to the Traditional IRA
- Savings and Investments:
  - 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 basis in property you sold (if basis is not reported on 1099-B)
- Unemployment, state tax refund (1099-G)
- Gambling income (W-2G or records showing income, expenses)
- Amount of any alimony received
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- Jury duty records
- Income and expenses from hobby

- Prizes and awards
- Other forms 1099

### **Affordable Care Act**

- Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
- Marketplace exemption certificate (ECN) if you filed for and received an exemption from the Marketplace (Exchange)
- Form 1095-B and/or 1095-C if you had insurance coverage through any other healthcare provider

### **Other Deductions and Credits**

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Amount of state/local income tax paid (other than wage withholding)
- Amount of state and local sales tax paid
- Invoice showing amount of vehicle sales tax paid
- Amounts paid for healthcare insurance and to doctors, dentists, hospitals
- 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
- Expenses related to your investments
- Amount paid for preparation of last year's tax return
- Employment-related expenses (union dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Receipts for energy-saving home improvements
- Record of estimated tax payments made
- Receipts for classroom expenses (for educators in grades K-12)
- Form 5498-SA showing HSA contributions
- Record of moving expenses not reimbursed by employer

### **Self-Employment Expenses**

- Summary of all expenses for running your business
- Business-use asset (other than vehicle) information (cost, date placed in service, etc.) for depreciation
- Office in home information, if applicable
- **Business Use of Vehicle Information:**
  - Log of total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), miles driven while commuting
  - Amount of parking and tolls paid
  - If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

### **If you were affected by a federally declared disaster**

- City/county you lived/worked/had property in
- Appraisal, clean-up costs etc., records supporting the losses
- Records of rebuilding/repair costs
- Insurance reimbursements/claims to be paid

### **Additional documents and information that might be useful in preparation of your tax return**