

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, we've created a checklist to help you know what forms to bring.

Personal

- ☐ Your ID and social security number

Information

- ☐ Your spouse's ID and social security number if applicable
- ☐ Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS

Dependent(s)

- ☐ Dates of birth and social security numbers

Information

- ☐ Childcare records (including the provider's tax ID number) if applicable
- ☐ Income of dependents and of other adults in your home
- ☐ Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Sources of Income

Employed

- ☐ Forms W-2

Unemployed

- ☐ Unemployed, state tax refund (1099-G)

Self- Employed

- ☐ Forms 1099, Schedule K-1, income records to verify amounts not reported on 1099s (Zelle, Venmo, Paypal, etc.)
- ☐ Records of all expenses – check bank statements and receipts
- ☐ Business-use asset information (cost, date placed in service, etc.) for depreciation
- ☐ Office in home information, if applicable
- ☐ Record of estimated tax payments made (Form 1040-ES)

Rental Income

- ☐ Records of income and expenses
- ☐ Rental asset information (cost, date placed in service, etc.) for depreciation

Retirement Income

- ☐ Pension/IRS/annuity income (1099-R)
- ☐ Social security income (1099-SSA)

Savings & Investment or Dividends

- ☐ 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)
- ☐ Transactions involving cryptocurrency (Virtual currency)

Other Income

- ☐ Gambling income (W-2G)
- ☐ Royalty income (1099-MISC)
- ☐ Any other 1099s received
- ☐ Record of alimony paid/received with ex-spouse's name and SSN

**Type of
Deductions****Home 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)
- ☐ 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

Medical Expenses

- ☐ Amounts paid for healthcare insurance and to doctors, dentist, hospitals

Health insurance

- ☐ Form 1095-A (Covered CA)
- ☐ Form 1095-B (Medi-Cal)
- ☐ Form 1095-C (Employer-Provided Health Insurance)

Childcare expenses

- ☐ Fees paid to a licensed day care center or family day care for care of an infant or preschooler
- ☐ Amounts paid to a baby-sitter or provider care of your child under age 13 while you work
- ☐ Expenses paid through a dependent care flexible spending account at work

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

K- 12 Educator Expenses

- ☐ Receipts for classroom expenses (for educators in grades K-12)

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

**Other
Information**

- ☐ Record of estimated tax payments made (Form 1040-ES)
- ☐ Bank routing and account numbers to receive your refund by direct deposit or pay your balance due if you choose