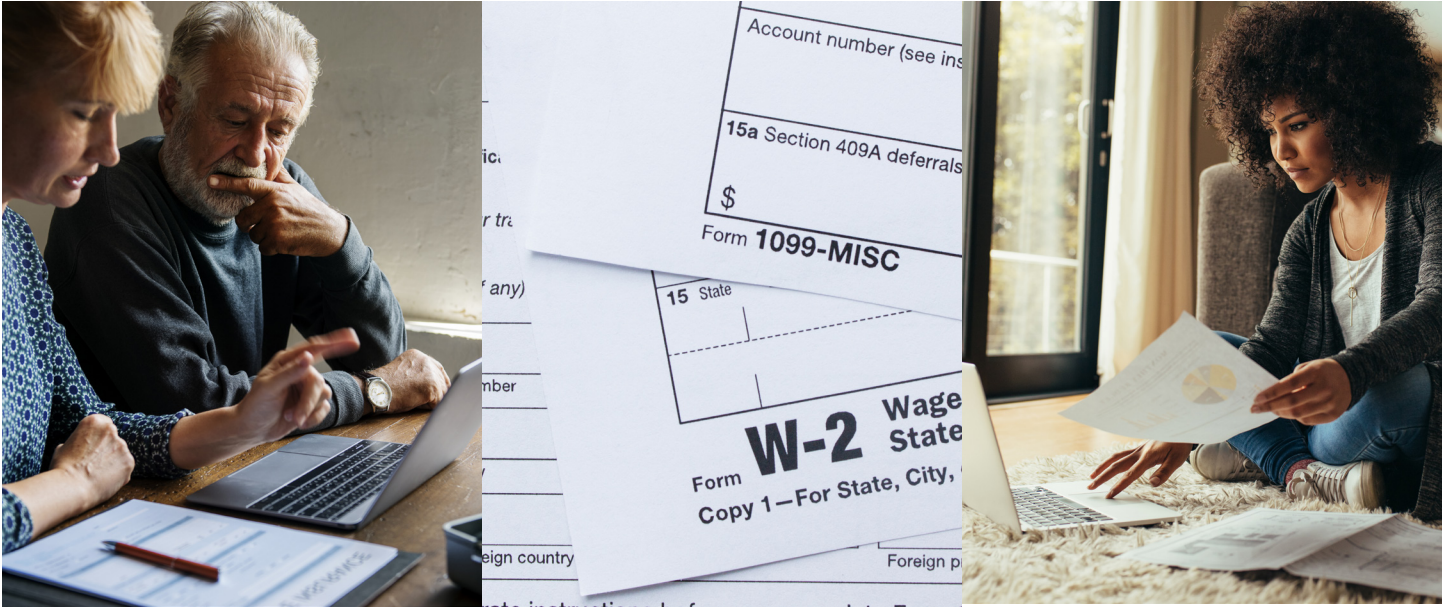


# Tax Documents Checklist



**You may need the following documents when you file your taxes:**

## PERSONAL INFORMATION

- Home address & phone number
- Social Security Numbers (SSN)
- Birth dates
- Bank account and routing numbers (for direct deposit or withdrawal)
- Government issued ID
- Previous year's tax return (Federal Form 1040)

## INCOME DOCUMENTS

- Earned Income (W-2, 1099-MISC)
- Unemployment Income (1099-G)
- Retirement Income (1099-R, SSA-1099, RRB-1099, CSA- or CSF-1099-R)
- Investment Income (1099-INT, 1099-DIV)
- Miscellaneous Income (1099-G, W-2G, Alimony or separate payments, Taxable scholarships or fellowships, 1099-C, 1099-SSA)

## HEALTH COVERAGE DOCUMENTS

- Marketplace Coverage (1095-A)
- Employer Coverage (1095-B, 1095-C)

## EXPENSE RECORDS

- Child & Dependent Care
- Employment & Business
- Contributions to Health Savings Accounts
- Contributions to Retirement Plans
- Medical & Dental Expenses
- Expense records related to the home (Form 1098 and Mortgage Credit Certificate)
- Expense records related to education (Form 1098-T and Form 1098-E)
- Charitable Contributions
- Disaster and Theft Losses
- Miscellaneous (Alimony/separate maintenance payments, gambling losses, penalties for early withdrawals on bank accounts)

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