



# TAX PREPARATION CHECKLIST

## 1. PERSONAL INFORMATION

Bring **all** documents below

- Valid picture ID
- Taxpayer Identification Number:** Social Security Card, Social Security Number verification letter, or Individual Taxpayer Identification Number (ITIN)

## 2. PROOF OF INCOME

Bring **all** documents that apply

- W-2s** for all jobs last year
- 1099s** for any other income received last year including unemployment income
- Statements for prizes, scholarships/fellowships, or lottery/gambling winnings

## 3. PROOF OF HEALTH INSURANCE

Bring **all** documents that apply

- 1095-A** if you had coverage through the Health Insurance Marketplace
- 1095-B** or **1095-C** if you had other kinds of insurance or coverage

## 4. ADDITIONAL ITEMS

Bring **all** documents that apply

- Checking and savings account information** to have your refund directly deposited
- Tax return** from last year, if available
- Child care expenses:** provider's address, phone #, and federal tax ID #
- Homeowners:** 1098 mortgage statement and property tax bills
- Education:** 1098-T college tuition and 1098-E student loan statements
- Alimony** paid or received
- Notices:** IRS, state tax, Health Insurance Marketplace, or anything that says "IMPORTANT TAX DOCUMENT"

**Ready to file?** Call our hotline at **888-434-8248** to make an appointment with an IRS-certified volunteer tax preparer at a location near you.