



Tax Documentation Checklist

Please review this list carefully and check off all items that apply to your situation this year. Missing documents can lead to IRS delays or rejected returns.

PERSONAL IDENTIFICATION

- **Photo ID:** Valid Driver's License, State ID, or Passport for the taxpayer (and spouse, if filing jointly).
- **Social Security:** Social Security Cards for yourself and all dependents you are claiming.

INCOME: EMPLOYMENT & GOVERNMENT

- **W-2 Forms:** From all employers you worked for during the year.
- **1099-G:** If you received any state unemployment compensation.
- **1099-R:** For any retirement, 401(k), IRA, or pension distributions/disbursements.
- **W-2G:** For any gambling or lottery winnings.

INCOME: BUSINESS & INVESTMENTS

- **1099-NEC / 1099-MISC:** For self-employment, freelance work, or "gig" jobs (e.g., Uber, Lyft, DoorDash, Trucking, etc.).
- **1099-B / 8949:** Summary of stock or cryptocurrency trades (e.g., Robinhood, Coinbase, Fidelity).

HEALTH INSURANCE (CRITICAL)

- **1095-A (Health Insurance Marketplace): Required** if you have insurance through Healthcare.gov or a state specific insurance exchange.

Note: The IRS will automatically reject your return if this form is missing.

EDUCATION & HOMEOWNERSHIP

- **1098-T:** Tuition statement for college courses or trade programs.
- **1098 (Mortgage Interest):** Showing interest, property taxes, and insurance paid on your home.

EXPENSES & DEDUCTIONS

- **Childcare/Daycare:** Total paid to the facility or individual.
 - *Must include the provider's Name, Address, and Tax ID/SSN.*
- **Charitable Donations:** Year-end statements from your church or any registered 501(c)(3) non-profit.
- **Business Expenses:** (Self-employed only) Log of mileage, equipment, and supply costs.

IMPORTANT REMINDER

- **Accuracy:** Ensure all names match exactly as they appear on Social Security Cards.
- **Direct Deposit:** Please provide a **voided check** if you would like your refund deposited directly into your bank account.