



## 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.