



## TAX TIME CHECKLIST

# Make the most of your tax refund

Tax time doesn't have to be stressful. Being organized and prepared can make the process smoother and help you reach your money goals.

## What to bring

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### 1 Tax documents

Avoid multiple trips by bringing your important papers and information when you meet with your tax preparer.

Photo ID

Social Security card or verification letter, or Individual Taxpayer Identification Number (ITIN) assignment letter, for all family members

W-2 forms for all jobs worked in January through December of last year

Form W-2G and other 1099 forms for other income in January through December of last year

Form 1099-G for unemployment compensation and state or local tax refunds

Child care provider name, address, and tax ID number, and amount paid in January through December of last year

Copy of last year's state and federal tax returns

Other applicable tax-related documents, such as: interest statements, federal loan documents, retirement statements, list of organizations to which you made charitable donations, etc.

Any letters, correspondence, or other documents sent to you by the IRS or your state tax administration

Forms 1095-A, B or C, Affordable Health Care Statements, or health insurance exemption certificates

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### 2 Account information

Bring your bank or credit union account information so you can easily deposit your refund and use some of your refund for savings.

Bank, credit union, or prepaid card account and routing number

Voided check



Consumer Financial  
Protection Bureau

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## MAKE THE MOST OF YOUR TAX REFUND

### Additional information

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You may need to bring more documents, depending on your situation. If you have questions about what to bring, contact your local tax preparation office. If you are married and filing jointly, you and your spouse should go together, because both of you must sign the tax return.

### Did you know?

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Getting free tax help is one step forward in reaching your money goals. Saving part of your tax refund is another great step. If you qualify, the IRS certified volunteers will prepare your tax return for free. Find out more at [irs.gov/individuals/free-tax-return-preparation-for-qualifying-taxpayers](https://irs.gov/individuals/free-tax-return-preparation-for-qualifying-taxpayers). If you receive a tax refund, ask your tax preparer to explain all your saving options.

Information adapted from [irs.gov/Individuals/Checklist-for-Free-Tax-Return-Preparation](https://irs.gov/Individuals/Checklist-for-Free-Tax-Return-Preparation).