

# Make the most of your tax refund

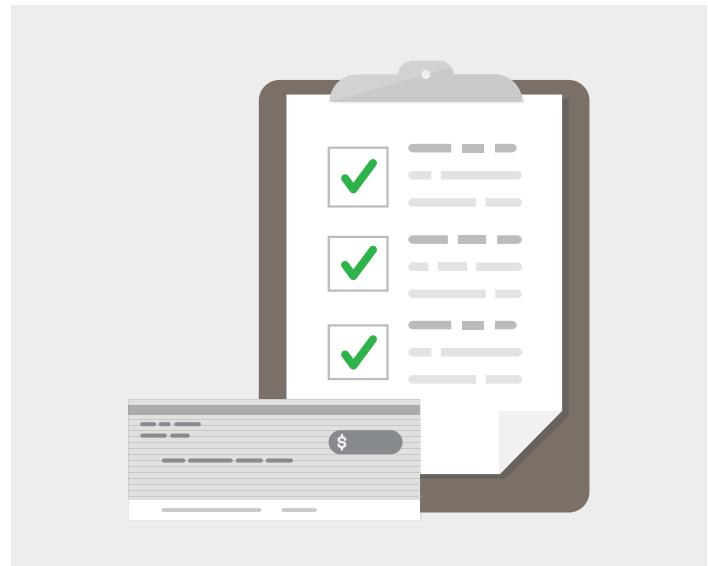
Tax time doesn't have to be stressful.

Being organized and prepared can make the process smoother and help you reach your money goals.

## Did you bring?

- 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.
- Forms 1095-A, B or C, Affordable Health Care Statements, or health insurance exemption certificates
- Bank, credit union, or prepaid card account and routing number
- Voided check

Let your tax preparer know if you do not have any of the above items.



## Did you know?

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 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).