

## **Personal Tax Document Checklist**

- Copy of last 2 filed year's Tax Returns
- Picture ID (Driver's License or State ID or passport)
- All W-2's
- All 1095 A, B, and/or C – Health Insurance Coverage
- All 1099's
- Mortgage Interest Statement
- Dividend and Interest Income Statements
- Relocation Expenses and Relocation Package from Relocation Service (if applicable)
- Real Estate Taxes – including PIN (new for 2009)
- Childcare Expenses and Provider (if applicable: name, address, and EIN of facility)
- Charitable Donation Receipts
- HUD Statements for any sale or purchase of property
- Any other applicable documents pertaining to your individual circumstances (for example: divorce decree, social security statement, unemployment statement, etc.)
- Any foreign interest, income, or asset information (if applicable)
- Any digital, virtual, cryptocurrency or similar acquisitions or sales
- Any correspondence received from the IRS or other tax agency (if applicable)