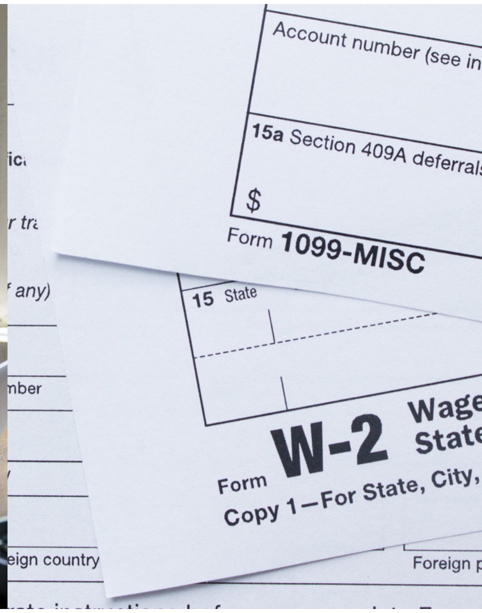
Tax Documents Checklist



You may need the following documents when you file your taxes:

PERSONAL INFORMATION

- ☐ Home address & phone number
- ☐ Social Security Numbers (SSN)
- ☐ Birth dates
- ☐ Bank account and routing numbers (for direct deposit or withdrawal)
- ☐ Government issued ID
- ☐ Previous year's tax return (Federal Form 1040)

INCOME DOCUMENTS

- ☐ Earned Income (W-2, 1099-MISC)
- ☐ Unemployment Income (1099-G)
- ☐ Retirement Income (1099-R, SSA-1099, RRB-1099, CSA- or CSF-1099-R)
- ☐ Investment Income (1099-INT, 1099-DIV)
- ☐ Miscellaneous Income (1099-G, W-2G, Alimony or separate payments, Taxable scholarships or fellowships, 1099-SSA)

HEALTH COVERAGE DOCUMENTS

- ☐ Marketplace Coverage (1095-A)
- ☐ Employer Coverage (1095-B, 1095-C)

EXPENSE RECORDS

- ☐ Child & Dependent Care
- ☐ Employment & Business
- ☐ Contributions to Health Savings Accounts
- ☐ Contributions to Retirement Plans
- ☐ Medical & Dental Expenses
- ☐ Expense records related to the home (Form 1098 and Mortgage Credit Certificate)
- ☐ Expense records related to education (Form 1098-T and Form 1098-E)
- ☐ Charitable Contributions
- ☐ Disaster and Theft Losses
- ☐ Miscellaneous (Alimony/separate maintenance payments, gambling losses, penalties for early withdrawals on bank accounts)

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