MyTaxRights

TAX CHECKLIST: REQUIRED DOCUMENTS

Whether you choose to prepare your own tax return or have someone else prepare it on your behalf, you must have documentation to support all income and expenses reported on your return. Below is a list of common documents you will generally need during the tax preparation process.

- ☐ A valid photo identification (e.g., driver's license);
- ☐ Social Security cards for yourself, and if applicable, your spouse and any dependents;
- ☐ Last year's federal and state income tax returns if available (not necessary, but extremely helpful);
- ☐ Your wage and earning statements (Forms W-2, 1099-MISC, and 1099-G) from all employers or payees;
- ☐ All interest and dividend statements from banks or other financial institutions (Forms 1099-INT and 1099-DIV);
- ☐ Statements from your lender showing all mortgage interest and property taxes paid (Forms 1098);
- ☐ All tuition expense statements received from any institution of higher education (Forms 1098-T);
- ☐ All receipts and documentation for cash and non-cash donations made to qualified charitable organizations (e.g., churches, schools);
- ☐ All receipts for any child day care expenses;
- ☐ All receipts for healthcare expenses, including medical bills and health insurance costs;
- ☐ Receipts and documentation for all ordinary and necessary expenses incurred to operate a trade or business; and
- ☐ Your bank account and routing numbers to receive your refund by direct deposit---the safest and fastest way to receive refunds.