



intuit PRESENTED BY FINANCIAL FREEDOM FOUNDATION

TAXPAYER'S CHECKLIST

Personal Information (originals or copies): mandatory for taxpayer, spouse and dependents

- Valid government issue ID cards (**NYS driver's license or ID card**) for all taxpayers and spouse (if filing jointly)
- Social Security Cards, Social Security Administration or **ITIN** letter for taxpayer and anyone being claiming on the tax return
- **IP-PIN** (individual Protection-Personal Identification Number) assigned by the IRS if you are a victim of identity theft
- Valid email address and telephone number

Sources of Income:

- Employed – W-2's for all jobs held in prior years
- Unemployed – 1099-G form
- Self-Employed – Misc. 1099 from (Records of expenses if applicable)
- Any additional income payments in cash or personal cheques

Addition Income (if applicable):

Retirement Income

- 1099-R Pension/IRA/Annuity
- 1099-SSA,1099-RRB – Social Security/RRB

Savings/Dividends & Investments

- 1099-INT, DIV, OID – Interest, dividend
- 1099-B – sales of stock

Other Income & Losses

- W-2G – Gambling winnings
- Jury duty pay
- Any other income

Deductions

- 1098-T College Tuition
- 1095-A if enrolled in a Health Insurance plan through the marketplace
- Medical expenses – amounts paid for Healthcare insurance, doctors, dentist, hospitals
- Any other tax-related information that was received

Childcare Expense:

- Childcare Agency's Tax ID and address
- Childcare provider Social Security Number, name and address
- Total fees paid

Note: Do not rely on memory when entering your information. Have the documents with you to check your information. Errors in items such as Social Security numbers and bank account information will cause delays in getting your refund.

For questions – Contact us at Tel#: [800-290-7189](tel:800-290-7189)