



## TAX PREPARATION DOCUMENT CHECKLIST

- Proof of Valid Government Identification (photo ID) for taxpayer and spouse (if applicable)
- Social Security cards (originals or copies) or ITIN (originals or copies) for you and anyone you are claiming on your tax return; or a letter from the Social Security Administration.
- Birth dates for you, your spouse and dependents on the tax return.
- If you are filing a joint return, both you and your spouse must be present.
- Wage and earning statements (Form W-2, W-2G, 1099-R, 1099-Misc) from all employers. Total amount earned from self-employment and expenses.
- Childcare expenses, total amount paid for childcare, Provider's Tax ID, name and address, or the individual name, social security number and address of the childcare provider.
- Tuition expenses – Form 1098-T
- If you purchased health insurance through the marketplace and were eligible for the premium tax credit, Form 1095-A, 1095-B or 1095-C.
- For Direct Deposit, routing number and bank account number. Copy of voided check.
- IP-PIN (Individual Protection- Personal Identification Number) assigned by the IRS for victim of Identity Theft.
- Unemployment Statement – available online only
- IRS Letter 6419 – Advanced Child Tax Payments Received
- Any other tax-related information you may have received.