

What Will I Need to File My Taxes?



Personal Information:

Your social security number or tax ID number

Your spouse's full name and social security number or tax ID number

Amount of any alimony paid and ex-spouse's full name and social security number

Your tax returns for the previous 1-3 years. Your Tax Professional can check them for accuracy

Information about Other People Who May Belong on Your Return:

Dates of birth and social security numbers or tax ID numbers

Childcare records (including the provider's tax ID number) if applicable

Income of other adults in your home

Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Education Payments

Forms 1098-T from educational institutions

Receipts that itemize qualified educational expenses

Records of any scholarships or fellowships you received Form 1098-E if you paid student loan interest

Employee Information

Forms W-2

Self-Employment Information

Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s

Records of all expenses — check registers or credit card statements, and receipts

Business-use asset information (cost, date placed in service, etc.) for depreciation

Office in home information, if applicable

Business Use of Vehicle Information

Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage

Amount of parking and tolls paid

If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

Rental Property Income:

Records of income and expenses

Rental asset information (cost, date placed in service, etc.) for depreciation

Source: IRS

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Retirement Income:

Pension/IRA/annuity income (1099-R)

Social security/RRB income (1099-SSA, RRB-1099)

Form 5498 showing IRA contributions

Traditional IRA basis

Savings and Investments:

Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)

Income from sales of stock or other property (1099-B, 1099-S)

Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

Other Income:

Unemployment, state tax refund (1099-G)

Gambling income (W-2G or records showing income, as well as expense records)

Amount of any alimony received

Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)

Jury duty records

Hobby income and expenses

Prizes and awards

Other 1099

Affordable Care Act

Form 1095-A if you enrolled in an insured plan through the Marketplace (Exchange)

Marketplace exemption certificate if you applied for and received an exemption from the Marketplace (Exchange)

Other Deductions and Credits

Receipts for classroom expenses (K-12 educators)

Form 5498-SA showing HSA contributions

Record of moving expenses (not reimbursed)

Forms 1098 or other mortgage interest statements

Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid

Real estate and personal property tax

Record of estimated tax payments made

Invoice showing amount of vehicle sales tax paid

Cash amounts donated to charitable organizations

Records of non-cash charitable donations

Amounts paid for healthcare (insurance/doctors/etc.)

Amount of miles driven for charitable/medical purposes

Expenses related to your investments

Amount paid for preparation of last year's tax return

Employment-related expenses (dues, uniform, etc.)

Job-hunting expenses

Receipts for energy-saving home improvements