

Tax Preparation Checklist

These are the most commonly-used resources you'll need to successfully complete your taxes for the tax year you are filing.

W-2s for each job held for each person in the household. This is issued by your employer for your wages received.

1099s showing other income (unemployment, social security, school loans, health care reimbursement, state tax refund, gambling winnings, contract work)

1098s showing payments you've made that can reduce your tax liability

1095-A if you received credit from the healthcare.gov marketplace Income/interest statements received for any savings account/investments

Proof of bank account numbers for direct deposit (can be found on a check)

Last year's tax return (if you have it)

Any other tax forms you received

Proof of identification (Photo ID) – if filing with in-person or virtual help

Birth dates for you, your spouse and dependents you are including on your tax return(s)

Access to a cell phone – if filing virtually on your own

Social Security Numbers* for every member of your household – bring physical copies of Social Security Cards for in-person appointments

**If you do not have a Social Security Number, an Individual Taxpayer Identification Number (ITIN) assignment letter may be substituted for you, your spouse and your dependents. If you need to apply for an Individual Tax Identification Number (ITIN) for yourself or a family member, you can [find out what other documents will need to apply here.](#)*

To help maximize your tax return, we also recommend that you collect:

Childcare expenses: name, address, Tax ID or Social Security Number of your child care provider

Business expenses and assets: if you're self-employed or have a small business

College: loans and/or scholarships received, and bills for technical/community college or university (Forms 1098-T/1098-E)

Educator expenses for teaching grades K-12 (school supplies and materials used in the classroom)

Charitable donations: list of contributions and amounts, receipts for contributions over \$250

Vehicles: vehicle sales tax, personal property tax statement for each car you own, total miles driven for the year and/or total miles driven for business

Renters documentation: amount of rent paid (if renting)

Homeowners: mortgage interest statement (Form 1098), real estate taxes paid, Statement of Property Tax Payable for the tax-filing year

Retirement/IRA: amount contributed to an IRA (Individual Retirement Account) and total value for the tax-filing year

To stay up to date on information and resources, please call TBS Tax Services for more information.