



# TAX SERVICE



## Not sure what items you need to prepare your tax return?

What you need to file your **taxes varies depending on your situation**. The following checklist will give you an idea of the **documents you might need**. Not every category will apply to you, so just pick those that do, and make sure you have that information available. You will be surprised at how much time you will save by organizing your information beforehand.

### Personal Information

Tax Identification Numbers are mandatory items on your tax prep checklist. All taxpayers will need the following information.

- Proof of identification (photo ID)
- Social Security cards or ITIN for you, your spouse, and dependents.
- Proof of foreign status, if applying for an ITIN. (Passport, Birth Certificate)

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## Dependent(s) Information

- Childcare records (including the provider's EIN or SSN) if applicable
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

## Sources of Income forms

- Wage and earning statements from all employers and business (if apply)
- Form W-2
- W-2G
- 1099-R
- 1099-Misc
- Income records to verify amounts not reported on 1099 Misc
- Schedules K-1
- 1099-G
- Record of estimated tax payments made (Form 1040-ES)
- Rental Income
- 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)
- Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC) - Transactions involving cryptocurrency (Virtual currency)
- Record of alimony paid/received with ex-spouse's name and SSN

## Types of Deductions

The types of deductions you can take depend a lot on your life situation. It is likely you will not need all of the records listed below.

- Forms 1098 or other mortgage interest statements.
- Real estate and personal property tax records.
- Receipts for energy-saving home improvements (e.g., solar panels, solar water heater).
- Charitable Donations.
- Medical Expenses.
- Educational Expenses 1098-T, 1098-E - State & Local Taxes.
- Retirement & Other Savings Accounts.