

What You'll Need for Tax Preparation

Keeping your tax documents and forms organized in one place helps ensure an accurate return, allows you to claim all eligible deductions and credits, and reduces delays caused by missing or incorrect information.

Personal Information

- Social Security number (SSN) or Individual Taxpayer Identification Number (ITIN) for you and all dependents
- Bank account and routing numbers (for direct deposit or tax payments)
- Prior-year tax return information:
 - Adjusted Gross Income (AGI)
 - Exact refund or amount owed (if applicable)
- Your legal name as shown with the Social Security Administration (notify SSA if your name changed)
- Current mailing address (notify the IRS if your address changed)
- Self-select PIN (if you e-filed last year)
- IRS Identity Protection PIN (IP PIN), if issued

Income Documents (W-2s, 1099s, and Other Forms)

You should receive these forms by mail or electronically in January or February.

Employment & Other Income

- **Form W-2** – Wages from employers (or corrected W-2, if applicable)
- **Form W-2G** – Gambling or lottery winnings

1099 Forms (Common Types)

- **Form 1099-K** – Payments from payment cards and online marketplaces
- **Form 1099-G** – Government payments (e.g., unemployment benefits)
- **Form 1099-INT** – Interest income
- **Form 1099-DIV** – Dividends and distributions
- **Form 1099-NEC** – Freelance or independent contractor income
- **Form 1099-R** – Retirement plan distributions, pensions, or annuities
- **Form SSA-1099** – Social Security benefits
- **Form 1099-MISC** – Other miscellaneous income
- **Form 1095-A** – Health Insurance Marketplace Statement
- Records of **digital asset transactions** if no information return was received

Documents for Credits & Deductions

- Childcare or dependent care expense records
- Mortgage interest and property tax statements (if itemizing)
- Charitable donation receipts (if itemizing)
- Health Savings Account (HSA) or Flexible Spending Account (FSA) contribution records
- Medical and healthcare expenses (special rules apply if itemizing)
- Retirement contribution records
- Education-related expenses (tuition, books, supplies) for students or educators

Side Jobs & Self-Employment Documents

- Bank statements and reports from payment apps, card processors, or online marketplaces
- Records of checks or cash received
- Receipts and mileage logs for:
 - Travel
 - Vehicle use
 - Meals and gifts
- Office and business expense records
- Estimated tax payment records
- Other business income and expense documentation