



# PERSONAL INCOME TAX

## ◆ CHECKLIST ◆

*This is only a checklist of items that may be used in preparing your personal income tax return. Please bring any official documents that apply to you. For all other income and expenses please bring totals only.*

### Personal information to verify

- Social Security numbers and dates of birth for you, your spouse, your dependents
- REQUIRED! Valid Driver's License or State Issued photo ID
- Bank account number and routing number, if depositing your refund directly into your account
- Proof of residency for EIC (Earned Income Credit) and Child Tax Credit
- IP PIN letter issued annually from IRS (for compromised or stolen identity)

### Information about your income

- W-2 forms for you (and your spouse)
- SSA-1099 for Social Security benefits received
- 1099-R retirement income, Form 8606 for payments/distributions from IRAs or retirement plans
- 1099-INT, -DIV, -B, or K-1s for investment or interest income (\*see details other side.)
- 1099-G forms for unemployment income, or state or local tax refunds
- Alimony received
- 1099-S forms for income from sale of a property
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.
- 1099-C or 1099-A for any debts cancelled or property abandoned
- Self-Employment, Rental or Farm Income (totals of income and expenses by category)

### Deductions and credits

*The following items can help reduce the amount of your income that is taxed, which can increase your tax refund, or lower the amount you owe:*

- Form 1095-A for Affordable Care Act (health insurance verification)
- Form 1098-E for student loan interest paid (or loan statements for student loans)
- Form 1098-T for tuition paid - this form is now REQUIRED!
- For teachers: totals for expenses paid for classroom supplies, etc.
- Records of IRA contributions made during the year
- Records of Medical Savings Account (MSA/HSA) contributions
- Self-employed health insurance payments
- Records of moving expenses
- Alimony paid
- Child care costs: provider's name, address, tax ID, and amount paid
- Adoption costs: SSN of child; records of legal, medical and transportation costs
- Forms 1098: Mortgage interest, private mortgage insurance (PMI).
- Investment interest expenses
- Charitable donations: qualified charity receipts, value of donated property with receipt; miles driven
- Medical and dental expense records totaled; amount paid out of pocket for health insurance
- Casualty and theft losses: amount of damage, insurance reimbursements
- Records/amounts of other miscellaneous tax deductions: union dues; unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.)

### Taxes you've paid

- Federal and state estimated tax payments and dates paid
- Real estate tax paid receipt
- Personal property tax paid receipt

*Brought to you courtesy of:*

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