

What To Bring To Your Tax Appointment

Personal documents	Income
<ul style="list-style-type: none"> ✓ Government-issued Photo ID ✓ Social Security Cards, Social Security Number verification letters, or Individual Taxpayer Identification Number assignment letters for you, your spouse, and any dependents ✓ Birthdates for you, your spouse, and dependents on the tax return ✓ Bank account and routing number or a voided check for direct deposit of your refund ✓ 2023 and 2024 tax return, if you have them 	<p>Employment Income</p> <ul style="list-style-type: none"> ➢ W-2 form(s) for all jobs last year (your employer(s) will have sent you this by January 31st) <p>Self-Employment Income</p> <ul style="list-style-type: none"> ➢ 1099-NEC and/or 1099-K ➢ Records of income not reported on 1099 forms ➢ Records of expenses including receipts, credit statements, etc. ➢ Record of estimated tax payments <p>Retirement Income</p> <ul style="list-style-type: none"> ➢ SSA-1099 form for Social Security benefits ➢ 1099-R for pension/IRA/annuity income <p>Unemployment Income</p> <ul style="list-style-type: none"> ➢ 1099-G for unemployment benefits <p>Other sources of income</p> <ul style="list-style-type: none"> ➢ 1099-G for refund of state/local income taxes ➢ 1098-T for scholarships/fellowships ➢ 1099-R for disability income ➢ Income or loss from the sale of stocks, bonds, or real estate ➢ Income or loss from rental property ➢ Alimony received ➢ Statements for prizes or lottery/gambling winnings ➢ Tip income reported on W-2, 1099-NEC, 1099-K, 4137, or record of tip income to report on Schedule C. ➢ Overtime income, bring last pay statement. ➢ Interest and dividend statements from banks ➢ Records for any other income
Other Tax Documents	Expenses
<ul style="list-style-type: none"> ➢ Form 1095-A If you had coverage through the Health Insurance Marketplace, you will need to bring this form. ➢ If you receive any other tax documents from the IRS, your state tax agency or anything that says "IMPORTANT TAX DOCUMENT" please bring it with you. 	<ul style="list-style-type: none"> ➢ Retirement contributions, including a 401(k) or IRA ➢ State and local taxes you've paid ➢ Mortgage statements and property tax bills if you are a homeowner ➢ College tuition (1098-T) and student loan statements (Form 1098-E) ➢ Childcare expenses, including payment records or receipts and provider's name, address, and federal tax ID number (either their Social Security Number or Employment Identification Number) ➢ VIN and auto-loan payment statements for personal use new cars purchased in 2025. ➢ Receipts for charitable donations ➢ Medical and dental bills ➢ Records for supplies used as an educator