

Personal Tax Return Document Reference

***NOT an exhaustive list - just for examples!**

Income:

- Forms W2 from “Traditional” Jobs
- Forms 1099-NEC from Non-employment Compensation (Contractors, “Gig” Jobs)
- Schedules K-1 from S-Corps, Partnerships, or Trusts (or Form 1041 for Distributions from a Trust)
- Forms 1099-B from Stocks, Bonds, Mutual Funds, or Cryptocurrency
- Forms 1099-DIV or 1099-INT from Dividends or Interest Earned
- Forms 1099-S and Closing Documents if you Sold a Home
- Forms 1099-SA for Funds Spent from a HSA or MSA
- Forms 1099-G for Unemployment or Federal, State, or Local Government Payments
- Forms SSA-1099 or SSA-1042S for Social Security Benefits Received
- Forms 1099-R for Retirement Income and Distributions (Including Rollovers)
- Forms W2-G from Gambling Winnings
- Forms 1099-MISC for Royalties, Real Estate Income, or Miscellaneous Income
- Forms 1099-K from Third-Party Transactions such as Shopify Payments, Paypal, Etsy, Square, etc.
- Records of Any Other Taxpayer or Household Income

Identification:

- Social Security Number or ITIN (And Spouse’s if Filing Joint)
- Unexpired Photo ID (Drivers License, State ID, Passport - Including Spouse’s if Filing Jointly)
- IP PIN (if Assigned one by the IRS - Including Spouse’s if Filing Jointly)
- Copies of Previous Tax Returns (3 Years if Possible)
- Bank Routing and Account Number for Direct Deposit/Withdraw Purposes

If you are Claiming Dependents:

- Dependents Social Security Numbers or ITINs
- Dependents IP PIN (if Assigned one by the IRS)
- Form 8332 for Dependents of Which you are NOT the Custodial Parent
- Proof of Residence for Dependents (School/Doctor Records, Leases, Court Records, Social Service Records)

Deductions/Credits:

- Mortgage Interest, Points Paid (Form 1098), and Property Tax Records if you Own a Home
- Medical Expenses (If More than 7.5% of your Adjusted Gross Income - Only Deducted if you Itemize)
- Childcare Expenses (Including Provider’s EIN or SSN, Address, and Total Paid)
- Educational Expenses (Form 1098-T, Tuition, Fees, and Expenses Paid to Eligible Postsecondary Institutions)
- HUD-1 Settlement Statement and Closing Documents if you Purchased or Refinanced a Home
- Receipts For Eco-Friendly Energy-Efficient Home Upgrades or Electric Vehicle Purchases
- Vehicle Sales Tax Paid if you Purchased or Leased a Vehicle Receipts of Charity Donations (Only Deducted if you Itemize)
- Student Loan Interest (Form 1098-E)
- Teacher Expenses (if you are an Eligible Educator, up to \$300 per Taxpayer)
- HSA/MSA Contributions (Form 5498-SA)
- Moving Expenses (for Active Duty Military Members Only)
- Alimony (if Divorce or Separation Agreement was Made BEFORE Jan 1, 2019)
- Form 1095-A if you had Health Insurance Through the Marketplace

