



Documents Needed to Prepare Your Tax Return

Personal Information

- ☐ Complete the Personal Information Questionnaire.
- ☐ Government-issued Photo ID (taxpayer and spouse (if married)).
- ☐ Social Security card for everyone included on the tax return.
- ☐ Most recent federal/state tax return.
- ☐ Bank name and routing/account information.

Income Information

- ☐ W-2 (wage statements).
- ☐ 1099-INT (interest income).
- ☐ 1099-DIV (dividend income).
- ☐ 1099-B (transaction summary – capital gains/losses).
- ☐ 1099-R (pension/annuity/retirement plan distributions).
- ☐ 1099-S (real estate transactions).
- ☐ SSA-1099 (Social Security income).
- ☐ 1099-MISC (miscellaneous income).
- ☐ 1099-NEC (non-employee income).
- ☐ 1099-K (payment cards and 3rd-party network payments).
- ☐ 1099-C (cancellation of debt).
- ☐ Summary of alimony received in 2023.
- ☐ Summary of other income (tips, jury duty, gambling winnings, etc.)

Deduction and Credit Information (also gather receipts related to these items)

- ☐ If you believe you can Itemize Deductions, complete the Itemized Deduction Worksheet.
- ☐ 1098-T (tuition expenses) and other education-related expenses.
- ☐ Child or Dependent Care expenses.
- ☐ Residential Energy Efficiency and Clean Energy related expenses.

Other Information

- ☐ Summary of estimated tax payments paid to IRS or state.
- ☐ Form 1095-A, 1095-B or 1095-C (health insurance coverage).
- ☐ Form 1099-SA, 1099-LTC (Health Savings Account and long-term care reimbursements).
- ☐ Form 5498-SA (HSA contributions) or Form 5498 (IRA contributions).