



Forms you'll need...

Personal information

- Drivers license numbers and dates of birth for you, your spouse, your dependents
- Copies of last year's tax return for you and your spouse (not required)
- Bank account number and routing number, if you'd like your refund deposited directly into your account

Your income

- W-2 forms
- 1099-C forms for cancellation of debt
- 1099-G forms for unemployment income, or state or local tax refunds
- 1099-MISC forms for you and your spouse (for any independent contractor work)
- 1099-R, Form 8606 for payments/distributions from IRAs or retirement plans
- Business or farming income - profit/loss statement, capital equipment information
- 1099-INT, -DIV, -B, or K-1s for investment or interest income
- SSA-1099 for Social Security benefits received
- Prior year installment sale information - Forms 6252, principal and interest collected
- 1099-S forms for income from sale of a property
- Rental property income and expenses: P&L, suspended loss info
- Alimony
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.

Adjustments to income

- Records of IRA contributions made during the year
- Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-high school)
- For teachers: Canceled checks or receipts for expenses paid for classroom supplies, etc.
- Moving expenses
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- Records of Medical Savings Account (MSA) contributions
- Self-employed health insurance payment records
- Form 1098-E for student loan interest paid
- Alimony and Keogh, SEP, SIMPLE, and other self-employed pension plans



If you itemize your deductions:

Deductions, credits, childcare, education, etc.

- Child care costs: provider's name, address, tax ID, and amount paid
- Education costs: Form 1098-T, education expenses
- Adoption costs: SSN of child; records of legal, medical and transportation costs
- Forms 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid
- Investment interest expenses
- Charitable donations
- Medical and dental expense records
- Casualty and theft losses: amount of damage, insurance reimbursements
- Records of home business expenses, home size/office size, home expenses
- Rental property income/expenses: profit/loss statement, rental property suspended loss info
- Records/amounts of other miscellaneous tax deductions
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