

TAX PREPARATION CHECKLIST

Bring 2018 documents for you and each person in your household

1. PERSONAL INFORMATION

Bring **all** documents below

- Valid picture ID**
 - Taxpayer Identification Number:** Social Security Card, Social Security Number verification letter, or Individual Taxpayer Identification Number
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2. PROOF OF INCOME

Bring **all** documents that apply

- W-2s** for all jobs last year
 - 1099s** for any other income received last year
 - Statements for prizes, scholarships/fellowships, or lottery/gambling winnings
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3. PROOF OF HEALTH INSURANCE

Bring **all** documents that apply

- 1095-A** if you had coverage through the Health Insurance Marketplace
 - 1095-B** or **1095-C** if you had other kinds of insurance or coverage
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4. ADDITIONAL ITEMS

Bring **all** documents that apply

- Checking and savings account information** to have your refund directly deposited
- Tax return** from last year, if available
- Child care expenses:** provider's address and federal tax ID #
- Homeowners:** mortgage statements and property tax bills
- Education:** college tuition and student loan statements
- Alimony** paid or received
- Notices:** IRS, state tax, Health Insurance Marketplace, or anything that says "IMPORTANT TAX DOCUMENT"