



What to Bring to Prepare Your Taxes

Personal Documents

- 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

Employment Income

- W-2 form(s) for all jobs last year (your employer(s) will have sent you this by January 31st)

Self Employment Income

- 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

Retirement Income

- SSA-1099 form for Social Security benefits
- 1099-R for pension/IRA/annuity income

Unemployment Income

- 1099-G for unemployment benefit

Any other income

Expenses

You may be able to claim tax deductions for some of the expenses you have. These deductions reduce the income you are taxed on. Bring documentation for all of the following expenses you have.

- 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 provider's address and federal tax ID number
- Receipts for charitable donations
- Medical and dental bills
- Records for supplies used as an educator