

It's easy to be prepared!

Personal and demographic information

- Full legal name, birthdates and social security number for each person on the return
- Mailing address including zip code
- Copy of prior year returns
- Proof of health insurance for each person on the return (form 1095)
- Your Third Economic Impact Payment – Letter 6475
- 2021 Advance Child Tax Credit payments – Letter 6419

Income documents

- Wages from employment (form W-2)
- Earnings from self-employment (form 1099-NEC)
- Interest and investment income (forms 1099-INT, 1099-DIV, 1099-B, etc)
- Retirement income (forms 1099-R, SSA-1099)
- Unemployment compensation (form 1099-G)
- Proof of alimony received (for divorces prior to 2018)
- Documentation of any other income (gambling, prizes & awards, etc.)

Deductions and Credits

- IRA / HSA contributions made (form 5498)
- Student loan interest paid (form 1098-E)
- Mortgage interest and property taxes paid (form 1098)
- Medical and dental expenses paid
- Charitable contributions (cash and non-cash)
- Child and dependent care expenses paid
- Post-secondary education expenses paid (form 1098-T)
- Records of self-employment expenses

Taxes and Banking info

- Estimated tax payments made
- Bank routing and account numbers (electronic deposit/payment)