

# WHAT DO I NEED TO FILE MY TAXES?

## PERSONAL

- You and/or Spouse social security number
- Unexpired state issued ID
- Routing/account numbers if direct deposit/balance due
- 3<sup>rd</sup> Economic Stimulus Payment (\$1,400)

## DEPENDENTS

- Social Security numbers (cards) and date of birth
- Childcare records-provider's name and ID number
- IRS Letter 6419-that has the details to report your advance Child Tax Credit (CTC) payments

## INCOME

- W2s (Including W2-G for Lottery)
- Unemployment (1099-G)
- Retirement, Pension, Annuity (1099-R)
- Social Security (1099-SSA)
- Rental Income and Expenses
- Alimony Paid/Received with ex-spouse's name and SSN

## SELF EMPLOYMENT

- Forms 1099-NEC, 1099-K, K1, Other income records
- Records of ALL Expenses
- Business use of home (If Applicable)

## SAVINGS, INVESTMENTS, DIVIDENDS

- Interest, Dividend Income (1099-Int, 1099-DIV)
- Income from sale of stocks/property (1099-B, 1099-S)
- Health Savings (1099-SA)

## ITEMIZING

- Mortgage Interest (Form 1098-Int)
- House/Car Taxes, Charitable Contributions & Medical Expenses

## OTHER

- College Expenses (1098-T)/Student Loan Interest (1098-E)
- All other tax forms received