

WHAT TO BRING TO FILE YOUR TAXES

A simple checklist — just bring the items that apply to you

1 ABOUT YOU & YOUR FAMILY

- ☐ Unexpired photo ID for you & your spouse (driver's license or passport)
- ☐ Social Security cards (or ITIN) for everyone on the return
- ☐ Birth dates for you, your spouse, and your kids
- ☐ Last year's tax return, if you have it
- ☐ IRS identity PIN (only if the IRS gave you one)

2 MONEY YOU MADE

- ☐ **W-2** — from each job you worked
- ☐ **1099-NEC / 1099-MISC** — freelance or side work
- ☐ **1099-INT / 1099-DIV** — bank interest or investments
- ☐ **1099-G** — unemployment pay
- ☐ **SSA-1099 / 1099-R** — Social Security or retirement
- ☐ **1099-K** — money from apps like PayPal, Venmo, Cash App
- ☐ Notes on any other income (rent, tips, cash jobs)

3 DEPENDENTS, KIDS & SCHOOL

- ☐ Birth certificates for each dependent being claimed
- ☐ Social Security cards for each dependent being claimed
- ☐ **Proof of residency for each dependent** (required every year — e.g. school, medical, or lease records showing the child's address)
- ☐ Daycare provider's name, address, tax ID & amount paid
- ☐ **1098-T** — college tuition costs

4 DEDUCTIONS & CREDITS

- ☐ **1098** — home mortgage interest & property taxes
- ☐ Receipts for money you gave to charity
- ☐ Big medical or dental bills you paid
- ☐ Money you put into an IRA or retirement account
- ☐ **1095-A** — health insurance from the Marketplace
- ☐ Receipts for energy-saving home upgrades
- ☐ Classroom supplies (if you're a teacher)
- ☐ **Car purchase agreement & loan interest** (new vehicle bought in 2025 or newer)
- ☐ **Any other tax documents you received** (any form or letter)

5 IF YOU OWN A BUSINESS

- ☐ Total money your business brought in
- ☐ Receipts for business costs, sorted by type
- ☐ Miles you drove for work & car expenses
- ☐ Home office size (if you work from home)
- ☐ Equipment you bought (date & price)
- ☐ Any 1099s you paid to workers
- ☐ Estimated taxes you already paid
- ☐ Your EIN & last year's business return

! **Important:** If there is no proof for a claim, it cannot be filed. Every deduction or credit must be backed by a document or receipt.

Questions? We're happy to help.

Tax Masters | compliance@taxmastersatwork.com