

Personal - EN



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Documents and Information Needed for Personal Tax Return

Personal Information

- Copies of last year's tax return for you and your spouse.
- Social Security or ITIN Number and dates of birth for you, your spouse, your dependents.
- Bank account number and routing number, if depositing your refund directly into your account.

Information about your income

- W-2 forms for you and your spouse.
- 1099-C forms for cancellation of debt.
- 1099-G forms for unemployment income, or state or local tax refunds.
- 1099-MISC forms for you and your spouse (for any independent contractor work).
- 1099-R, Form 8606 for payments/distributions from IRAs or retirement plans.
- 1099-S forms for income from sale of a property.
- 1099-INT, -DIV, -B, or K-1s for investment or interest income.
- SSA-1099 for Social Security benefits received.
- Business or farming income - profit/loss statement, capital equipment information.
- Rental property income and expenses: profit/loss statement, suspended loss information.
- Prior year installment sale information - Forms 6252, principal and interest collected during the year, SSN and address for payer.
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.

Adjustments to your income

- Form 1098-E for student loan interest paid or loan statements for student loans.
- Form 1098-T for tuition paid or receipts/ canceled checks for tuition paid for post-high school.
- For teachers: Canceled checks or receipts for expenses paid for classroom supplies, etc.
- Records of IRA contributions made during the year.
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.).
- Records of Medical Savings Account (MSA) contributions.
- Self-employed health insurance payment records.
- Records of moving expenses.
- Keogh, SEP, SIMPLE, and other self-employed pension plans.

Deductions and Credits

- Child care costs: provider's name, address, Tax ID, and amount paid.
- Education costs: Form 1098-T, education expenses.
- Adoption costs: SSN of child; records of legal, medical and transportation costs.
- Forms 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid.
- Investment interest expenses.
- Charitable donations: cash amounts, official charity receipts, canceled checks; value of donated property; miles driven and out-of-pocket expenses.
- Medical and dental expense records.
- Casualty and theft losses: amount of damage, insurance reimbursements.
- Records/amounts of other miscellaneous tax deductions: union dues; unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.).
- Records of home business expenses, home size/office size, home expenses.
- Rental property income/expenses: profit/loss statement, rental property suspended loss information.
- Taxes you have paid.
- State and local income taxes paid.
- Real estate taxes paid.
- Personal property taxes.
- Vehicle license fees based on value of vehicle.