

PERSONAL

Your social security number or tax ID number

Your spouse's full name, social security number or tax ID number, and date of birth

Information about your stimulus payment — also known as an economic impact payment (EIP) — if applicable — you may have IRS Notice 1444 or other records showing your EIP amount

Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS

IRS Letter 6475 — your 2021 Economic Impact Payment, to determine eligibility to claim the Recovery Rebate Credit

Routing and account numbers to receive your refund by direct deposit or pay your balance due if you choose

DEPENDENTS

Dates of birth and social security numbers or tax ID numbers

Childcare records (including the provider's tax ID number) if applicable

Income of dependents and of other adults in your home

IRS Letter 6419 – official documentation that has the details you need to report your advance Child Tax Credit (CTC) payments

INCOME

Forms W-2

Unemployment (1099-G)

-Self-Employment

Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or new 1099-NEC

Records of all expenses — check registers or credit card statements, and receipts

Business-use asset information (cost, date placed in service, etc.) for depreciation

Office in home information, if applicable

Record of estimated tax payments made (Form 1040-ES)

-Retirement Income

Pension/IRA/annuity income (1099-R)

Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)

Social security/RRB income: SSA-1099, RRB-1099

- Savings & Investments or Dividends

Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)

Income from sales of stock or other property (1099-B, 1099-S)

Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)

Expenses related to your investments

Record of estimated tax payments made (Form 1040-ES)

Transactions involving cryptocurrency (Virtual currency)

- Other Income & Losses

Gambling income (W-2G or records showing income, as well as expense records)

Jury duty records

Hobby income and expenses

Prizes and awards

Trust income

Royalty Income 1099-MISC

Any other 1099s received

Record of alimony paid/received with ex-spouse's name and SSN

State tax refund

TYPES OF DEDUCTIONS

-Home Ownership

Forms 1098 or other mortgage interest statements

Real estate and personal property tax records

Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)

All other 1098 series forms

-Charitable Donations

Cash amounts donated to houses of worship, schools, other charitable organizations

Records of non-cash charitable donations

Amounts of miles driven for charitable or medical purposes

-Medical Expenses

Amounts paid for healthcare, insurance, and to doctors, dentists, and hospitals

-Health Insurance

Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)

-Childcare Expenses

Fees paid to a licensed day care center or family day care for care of an infant or preschooler

Amounts paid to a baby-sitter or provider care of your child under age 13 while you work

Expenses paid through a dependent care flexible spending account at work

-Educational Expenses

Forms 1098-T from educational institutions

Receipts that itemize qualified educational expenses

Records of any scholarships or fellowships you received

Form 1098-E if you paid student loan interest

-K-12 Educator Expenses

Receipts for classroom expenses (for educators in grades K-12)

-State and Local Taxes

Amount of state and local income or sales tax paid (other than wage withholding)

Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles

-Retirement & Other Savings

Form 5498-SA showing HSA contributions

Form 5498 showing IRA contributions

All other 5498 series forms (5498-QA, 5498-ESA)

-Federally Declared Disaster

City/county you lived/worked/had property in

Records to support property losses (appraisal, clean-up costs, etc.)

Records of rebuilding/repair costs

Insurance reimbursements/claims to be paid

FEMA assistance information