

## Get Your Tax Documents Organized

To Prepare your Individual Tax Return, documents are essential.

### Upload the following:

- Prior year tax return(s)
- Bank account routing and account number for direct deposit of refund
- SSNs and birthdates of you and everyone you claim in your household
- Photo ID
  
- **W2** forms from your employer (one for each job)
- **1099-INT** from your bank (if you had interest income from savings or checking)
- **1099-B and 1099-DIV** from your broker (if you had investment income)
- **1099-G** Government / Unemployment Income Statement (if any)
- **1099-SSA** Retirement Income Statement (if any)
- **1099-R** Withdrawals from retirement accounts including rollovers (if any)
  
- **1095-A, 1095-B and/or 1095-C** Health Insurance Statement
- **1099-SA** from your Health Savings Account provider (if any)
  
- **1099-MISC** for self-employed individuals or contractors
- **K-1** forms for Partnership, S Corp, or Estate/Trust income (if any)
- **Business records** for self-employed individuals (such as spreadsheets, balance sheets)
- **Rental Income and Expense Records** for those who own rental property or rent-out part of their home
  
- **1098 Mortgage** Interest Statement from your Lender
- **1098-T** Tuition statement from your school
- **1098-E** Student Loan Interest Statement (if you paid interest on Student Loans)
- Child care expenses and provider information (including name, address, and tax ID)
- Charitable Donations Records / Receipts
- Medical Expenses (only if you had a lot of medical expenses > 10% of your income)
- Car Tabs (renewals each year)
- IRA Contributions
- Roth IRA Contributions and Roth Conversions
- Health Savings Account (HSA) Contributions
  
- Home Office information (sq ft of home, sq ft of home office)
- Property Tax Statement (for homeowners)
- Closing Statement (called HUD Statement) from your closing papers (if you bought or sold a home)