

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

Business records for Self-employed Individuals (such as spreadsheets, balance sheets):

- You will need records of your income (if not reported on a 1099-MISC).
- You will need records of business expenses such as: advertising expenses, office expenses, mileage (with odometer readings at beginning and end of the year), automobile information, phone, internet, equipment purchases, rentals, tools, software, supplies, sales, travel expenses (flights, meals, parking). **See enclosed spreadsheet.**
- Home Office information (sq ft of home, sq ft of home office)
- Records of health insurance costs.
- Records of any quarterly taxes (FED and STATE) paid during the year.

Other Typical Tax Documents:

- **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
- Property Tax Statement (for homeowners)
- Closing Statement (called HUD Statement) from your closing papers (if you bought or sold a home)