

List of Documents Required to File Individual Tax Return

(Note...if married and filing jointly, both spouses must be present and have the required documents)

Personal

- Photo ID
- Social Security Card
- Birth Dates
- Bank Account and Routing Numbers
- Previous two years tax returns

Income

- W-2's
- 1099's (NEC, MISC, DIV, INT, SSA, B, G, R, etc.)
- Income/Loss from sale of stocks, bonds, or real estate
- Income/Loss from rental property
- Alimony received
- Gain/Loss from gambling
- Interest or dividend statements from bank
- Records for any other income

Expenses

- Business/Self-Employment expense records
- Estimated tax payments
- State and local taxes paid
- Retirement contributions
- Mortgage statements and property tax bills
- College tuition (1098-T) and student loan statements
- Childcare expenses
- Charitable donation receipts
- Medical and dental bills
- Educator supplies records