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Single or Married  
With Children

What do I need to have my taxes filed?

**Contact Information Sheet**

**Personal Information**

- Tax Identification Numbers are mandatory items on your checklist. All taxpayers will need the following to do their taxes.
- Copy of your drivers license or state photo ID, (and spouses if married)
- Last year's tax return or your social security number or tax ID number
- If married your spouse's full name, spouses last year return or 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
- Routing and account numbers to receive your refund by direct deposit or pay your balance due if you choose

**Dependent(s) Information**

- Parents and caregivers should gather this information as they review what they need to file their taxes.
- 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
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

**Sources of Income**

**Employed**

- Forms W-2

**Unemployed**

- Unemployment (1099-G)

**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)

**Educational Expenses**

- Form 1098-E if you paid student loan interest

**K-12 Educator Expenses**

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

**Types of Deductions**

The types of deductions you can take depend a lot on your life situation. It's likely you won't need all of the documents listed below for your taxes.

**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