

Loretta L. Higgins, CPA
832.710.2780
Loretta@lorettahigginscpa.com
Lorettahigginscpa.securefilepro.com

Single or Married
Express Return Filing

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

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)

Loretta L. Higgins, CPA
832.710.2780
Loretta@lorettahigginscpa.com
Lorettahigginscpa.securefilepro.com

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)