

What Documents do I Need to File Taxes?

Your personal information tells the IRS and state taxing authority who's filing a return, where to contact you, and deposit your tax refund.

- Your name is exactly as it appears on your Social Security card
- Driver's License or State ID shows your current address
- Social Security number
- Copy of last year's federal and state/city (if applicable) tax returns
- Bank account number and routing number to receive your refund by direct deposit

Dependent Information

You'll need the following information if you can claim someone else as a dependent.

- Dependents name (as it appears on their Social Security card), dates of birth, and Social Security numbers (or tax ID numbers)
- Form 8332, if your dependent child's custodial parent is releasing their right to claim the child as a dependent

Sources of Income

You might receive several different forms documenting the income you received for the tax year that needs to be prepared. Some common ones include:

- W-2s from your employer(s)
- 1099-G forms for unemployment income and state or local tax refunds

- 1099-INT, 1099-DIV, and 1099-B for interest, dividends, and stock sales
- 1099-R and SSA-1099 for retirement plan distributions and Social Security benefits
- 1099-S for income from the sale of your residence or other property
- 1099-MISC for income from a rental property
- 1099-Q for distributions from a 529 plan or Coverdell ESA
- 1099-SA for distributions from a health saving account (HSA)
- Schedule K-1 for income from a passthrough business, trust, or estate
- Alimony received (if your divorce or separation agreement is dated on or before December 31, 2018)
- Records of any transactions involving cryptocurrency
- Information on other sources of income, such as gambling winnings, jury duty pay, cancellation of debt, etc.

If you have any of the following deductions, known as adjustments to income, you can claim them even if you don't itemize.

- Form 1098-E for student loan interest
- Records of contributions to an HSA, IRA, SEP, or self-employed retirement plan
- Alimony paid (for divorce or separation agreements dated on or before December 31, 2018)
- For teachers, expenses paid for classroom supplies
- Premiums paid for self-employed health insurance

Tax Credits

Tax credits are a dollar-for-dollar reduction in the amount of tax you owe. Generally, you'll need the following documentation to claim potentially valuable tax credits.

- Form 1098-T showing expenses for higher education
- Childcare costs and care provider's name, address, and tax identification number
- Adoption costs and Social Security number of child you legally adopted during 2022
- Form 1095-A if you purchase health insurance through the Health Insurance Marketplace

Estimated Tax Payments

If you're self-employed or earn a lot of money that doesn't have federal and state income tax withheld, you may have to make estimated tax payments. Ensure you include those estimates on your tax return, so you don't pay twice.

- Estimated tax payments made during the year to the IRS and state and local tax authorities
- Prior-year refunds applied to the current year
- Any amounts paid with an extension

Self-Employment Business Records and Deductions