

Tax Document Checklist



What do you need to bring
To File your taxes



PERSONAL INFORMATION

- Social Security or ITIN number and birth dates for you, your spouse and dependents



INCOME DOCUMENTS

- W-2, 1099 or Schedule K-1 form
- 1099-MISC, 1099-R, 1099-INT
- 1099-G (Unemployment compensation)
- Self-employment income and expenses
- Rental property documents
- Un-reimbursed expenses related to job (travel, uniforms, union dues, subscriptions)
- Job-hunting expenses
- Social Security Income 1099-SA



SELF-EMPLOYMENT DOCUMENTS

- Business Income: 1099-MISC
- Schedules K-1: Partnership income
- Business related expenses



ITEMIZED DEDUCTIONS

- Mortgage interest, real estate and personal property tax records (1098)
- Records of cash amounts donated to house of worship, schools and other charitable organizations



HEALTH CARE

- Form 1095-A (Obamacare)
- Form 1095-B or 1095-C, if you have insurance through a private plan or employer plan
- Information and receipts for medical and Dental expenses



EDUCATION

- Form 1098-T for tuition paid and education expenses (College and Universities)
- Child care cost: Provider's name and tax ID or SS



OTHER INFORMATION

- Foreign bank account information: Bank's name, account number, address

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Al lado de El Guero Check Cashing

6500 Spencer Hwy Ste 190 Pasadena, TX 77505
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