

What Should I Bring to the Tax Center?

Use this checklist to save time by getting organized before you come in!

www.ProspertaxHelp.org

You	Spouse	Dependents	Basic Info
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Social Security Cards or ITIN Letters for everyone on the tax return
<input type="checkbox"/>	<input type="checkbox"/>		Your valid photo ID
<input type="checkbox"/>			Bank information (routing and account numbers for direct deposit)
<input type="checkbox"/>			Last year's tax return (if you have it)
You	Spouse	Dependents	Documents Received
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2s – Wage and Tax Statement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1099s – Interest Income (1099-INT), Unemployment Compensation (1099-G), Miscellaneous Income (1099-MISC), Dividend Income (1099-DIV), Retirement Plan Distribution (1099-R) & Cancellation of Debt (Form 1099-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1095-A – Health Insurance Marketplace Statement
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1095-B – Health coverage form from insurance company
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1095-C – Health coverage form from large employer
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Health Insurance Marketplace exemption certificate
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-T – Tuition Statement - along with student account summary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-E – Student Loan Interest Statement
<input type="checkbox"/>	<input type="checkbox"/>		Form 1099-SSA – Social Security Benefit Statement
<input type="checkbox"/>	<input type="checkbox"/>		FOR HOMEOWNERS: Form 1098 – Mortgage Interest Statement
<input type="checkbox"/>	<input type="checkbox"/>		FOR HOMEOWNERS : Receipt showing real estate taxes paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Form W-2G – Certain Gambling Winnings
You	Spouse	Dependent	Personal Records
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and dependent care expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Education expenses – detailed student account summary
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Charitable contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	FOR HOMEOWNERS: Receipts for energy saving improvements on your home
You	Spouse	Dependent	If You Are Self-Employed
<input type="checkbox"/>	<input type="checkbox"/>		Record of business expenses, business income, and Forms 1099-MISC