

Documents You Need – Checklist

To have your tax return prepared you need to bring the following information with you:

- Proof of identification – Picture ID
- *Social Security Cards for you, your spouse and dependents or a Social Security Number verification letter issued by the Social Security Administration
- If you do not have a Social Security number Individual Taxpayer Identification Number (ITIN) assignment letter for you, your spouse and dependents
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statement(s) Form W-2, W-2G, 1099-R, 1099-Misc from all employers for each job held in 2016 for each person in the household
- 1098s showing payments you've made (school loans, property tax)
- 1095-A if you received credit from the healthcare.gov marketplace
- Interest and dividend statements from banks (Forms 1099)
- A copy of last year's federal and state returns if available
- Proof of bank account routing numbers and account numbers for Direct Deposit, such as a voided check
- Total paid for daycare provider and the daycare provider's tax identifying number (the provider's Social Security Number or the provider's business Employer Identification Number) if appropriate
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms.

It is extremely important that each person use the correct Social Security Number. The most accurate information is located on your original Social Security card. If you do not have an SSN for you or a dependent, you should complete Form SS-5, Social Security Number Application. This form should be submitted to the nearest Social Security Administration Office.