

Tax Preparation Checklist



These are the most commonly-used documents you'll need to successfully complete your taxes.

UPDATED 1/01/2022

W-2s for each job held in 2021 for each person in the household. This is issued by your employer for your wages received.

1099s showing other income (unemployment, social security, school loans, health care reimbursement, state tax refund, gambling winnings, contract work)

1098s showing payments you've made that can reduce your tax liability

1095-A if you received credit from the healthcare.gov marketplace Income/interest statements received for any savings account/investments

Bank account numbers for direct deposit (can be found on a check)

Last year's tax return (if you have it)

Federal Advance Child Tax Credit Letter from the IRS (Letter 6419)

Third round of Federal Stimulus Letter (Letter 6475) – not considered income

Any other tax forms you received

Social Security Numbers for every member of your household*

**If you do not have a Social Security Number, you may need to apply for an Individual Tax Identification Number (ITIN) for yourself or a family member if you haven't already. [Find out what other documents ITIN applicants will need here.](#)*

To help maximize your tax return, we also recommend that you collect:

Childcare expenses: name, address, Tax ID or Social Security Number of your child care provider

Business expenses and assets: if you're self-employed or have a small business

College: loans and/or scholarships received, and bills for technical/community college or university (Forms 1098-T/1098-E)

Educator expenses for teaching grades K-12 (school supplies and materials used in the classroom)

Charitable donations: list of contributions and amounts, receipts for contributions over \$250

Vehicles: vehicle sales tax, personal property tax statement for each car you own, total miles driven for the year and/or total miles driven for business

Renters documentation: amount of rent paid (if renting)

Homeowners: mortgage interest statement (Form 1098), real estate taxes paid, Statement of Property Tax Payable in 2021

Retirement/IRA: amount contributed to an IRA (Individual Retirement Account) and total value as of December 2021

To stay up to date on information and resources, please text "TAXES" to 211-211.