**Documents Needed to File Personal Taxes:**

* Valid Driver’s License
* Social Security Card
* Birth Certificates for Children (if applicable)
* Form W-2 – (Wages and Salary)
* Form W-2G – (Gambling Winnings)
* Form 1099 – R (Retirement Income)
* Form 1099 – Int (Interest)
* Form 1099 – Div (Dividends)
* SSA 1099 – (Social Security)
* 1099 NEC – (Independent Contractors)
* 1099 G – (Government Payments)
* 1099 – SA (MSA or HAS Distribution)
* 1099 – B (Broker or Barter Exchanges)
* RRB – 1099 (Railroad Retirement)
* Schedule k-1 (Partnership / S Corp Income or Losses)
* 1098 (Mortgage Interest)
* 1098 T (Tuition Payment)
* Form 1098-E – Student Loan Interest
* Form 1095 – Health Coverage (there are different versions and you may have more than one.)
* Records and Receipts to Document:
* Unreimbursed mileage related to work or volunteering
* Charitable donations
* Contributions to retirement plans
* Healthcare expenses
* Self-employment income and expenses, including any:
	+ Home office expenses
	+ Health insurance premiums paid
	+ Transportation costs
	+ Advertising Fees
* Rental property
* Moving expenses, if you moved for a new job
* Expenses for energy-efficient home improvements
* Tuition or fees paid for education for you, your spouse, or dependents
* Retirement accounts rollover
* Child care and dependent care expenses, including the employer identification number (EIN) or SSN of the care provider
* A copy of last year’s return.
* Financial account information to pay any balance due or receive any refund.