

What do I need to have on-hand to prepare my taxes?

Depending on your situation, you'll need a variety of documents. Here are some common items that you might need:

- Proof of identification (photo ID, Not Expired) for taxpayer/spouse.
- Your Social Security Card (SSN) or taxpayer identification number (ITIN) letter issued by IRS, for taxpayer/spouse and all dependents listed on the return.
- Your birthdate and birthdate for spouse and dependents (if any). Birth certificate for any dependent with a different last name than the taxpayer.
- If you are claiming a dependent other than your son or daughter:

If the child is:		
Your grandchild or great grandchild, stepson, stepdaughter, step-grandchild or step-great grandchild, child pending adoption, brother, sister, stepbrother or stepsister or a descendant of any of them (<i>such as a niece or nephew</i>), eligible foster child (<i>placed with you by an authorized placement agency</i>)	To prove relationship, bring the following information:	photocopies of documents that show evidence of the relationship, such as: • Birth certificates or other official documents of birth that verify your relationship • Marriage certificates that verify your relationship to the child • Letter from an authorized adoption agency • Letter from the authorized placement agency or applicable court document
	You will also need at least one document to establish residency requirements for dependent:	Photocopies of school (<i>no report cards</i>), medical, childcare provider (<i>provider can't be a relative</i>) or social service records Or Letter on official letterhead from a school, a health care provider, a social service agency, placement agency official, employer, Indian tribal official, landlord or property manager, or a place of worship that shows the name of your child's parent or guardian, your child's address and the dates that they lived with you.

- What documents do you need to **prove permanent and total disability for a dependent?** :
 - To prove permanent and total disability, IRS asks for a letter from the dependents doctor, other healthcare provider or any social service program or agency verifying the dependent is **permanently and totally disabled**.
- Income source documents:
 - W-2 - wages and salary
 - W-2G - gambling winnings
 - Form 1099-R - retirement income
 - Form 1099-INT - interest
 - Form 1099-DIV - dividends
 - Form 1099-NEC - self-employment income
 - Form 1099-K - reportable card payment transactions
 - Form 1099-MISC - Rents/Royalties/Other Income
 - Form 1099-G - government payments
 - Form 1099-SA - MSA or HSA distributions
 - Form 1099-B - broker or barter exchanges
 - Form SSA-1099 - Social Security benefits
 - Form RRB-1099 - railroad retirement
 - Schedule K-1 - partnership income or loss
 - Forms 1095-A, B or C, Affordable Health Care Statements
- Documents that reflect items you might have paid during the year:
 - Form 1098 - mortgage interest
 - Form 1098-E - student loan interest
 - Form 1098-T - tuition
- Records and receipts for:
 - Charitable donations
 - Contributions to retirement plans
 - Healthcare expenses
 - Self-employment income and expenses, including any:
 - Home-office expenses
 - Mileage Log
 - Health-insurance premiums paid
 - Transportation costs
 - Rental property
 - Tuition or fees paid for education for you, spouse, or dependents
 - Retirement account rollovers
 - Child care and dependent care expenses, including the employer identification number (EIN) or SSN of the care provider