

MYFREETAXES 2018 FILING SEASON

Tax Preparation Checklist

Whether you are planning to visit a free tax assistance location or planning to file your taxes on your own, organizing all of your tax documents beforehand can help save you time and make your tax filing easier. Here is a sample checklist to help you get your tax documents in order.

- W-2s** for each job held in 2017 for each person in the household, this form reports your name, wages, and other tax information to the IRS
- 1099s** showing other income (unemployment, social security, school loans, health care reimbursement, state tax refund, gambling winnings, contract work) that is reported to the IRS
- 1098s** showing payments you've made (school loans, property tax)
- 1095-A** if you received credit from the healthcare.gov marketplace
- Income/interest statements** received for any savings account/investments
- Bank account numbers:** a voided check or your bank or credit union's routing number and savings or checking account number for your refund to be deposited automatically into your account through direct deposit
- Last year's tax return** (if you have it)
- Social Security Numbers** for every member of your household

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:** amount of rent paid (if renting)
- ❑ **Homeowners:** mortgage interest statement (Form 1098), real estate taxes paid, Statement of Property Tax Payable in 2017
- ❑ **Retirement/IRA:** amount contributed to an IRA (Individual Retirement Account) and total value as of December 2017
- ❑ **Individual Tax Identification Number (ITIN):** if you need do not have a Social Security Number, you may need apply for an ITIN for yourself or a family member, find out what other documents you need to take with you when you get help filing your taxes for free