

# Get Organized Before You File

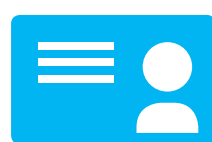


## MOST WILL NEED →

### Valid Identification To File Your Return

Have the following for all members of the household:

- Official first and last name - as shown on your Social Security card or other official ID card
- Social Security Number (SSN) – or Individual Taxpayer ID Number (ITIN), or Adoption Taxpayer ID Number (ATIN)
- Date of Birth



When you e-file your return, your last name, ID number and date of birth must match IRS records in order to be accepted.

### Information To Sign Your Return

- When you e-file your return online, you will sign electronically using a Self-Select PIN – a 5-digit number you create yourself.
- You must also verify your identity. You do this by providing an IRS-issued e-File PIN or information from last year's return – either your adjusted gross income or your Self-Select PIN.



### Bank Account To Receive Your Refund

The fastest way to receive your refund is to e-file and choose direct deposit. To do so, you'll need your checkbook so you can provide your bank account number and routing transit number (RTN).



## MANY WILL NEED →

### Common Income Source Documents



Wage Income



Interest Income

## SOME WILL NEED →

### Other Income Sources and Supporting Records

#### INCOME



Gambling Winnings



Retirement



Social Security



Dividends



Unemployment, State and Local Tax Refunds



Self-Employment Income



Stock Transactions – Brokerage Statements

#### PROOF FOR CREDITS & DEDUCTIONS



Mortgage Interest



HSA/MSA Distributions



College Tuition



Taxes Paid (Such as Vehicle Taxes and Real Estate Taxes)



Health Insurance Purchased Through the Marketplace



Child Care (Along with the Care Provider's Tax ID Number and Address)



Charitable Donation Records



Qualifying Medical and Dental Expenses