

Tips to 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 taxes online, you will sign and validate your electronic return by entering your prior-year Adjusted Gross Income (AGI).
- If you do not know your prior-year AGI and you do not have a copy of last year's return, you can get a transcript of the return from the IRS.



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