

TAX PREPARATION CHECKLIST



These are the most commonly-used resources you'll need to complete your taxes with any filing method:

- Social Security or ITIN cards for each person on your return (including spouse and dependents).
Photographs and copies of cards are acceptable. Prior year returns CANNOT be used to verify SSNs or ITINs.
- Government-issued photo ID for you and your spouse (if filing jointly).
Photo ID must be the physical card. Photographs or copies not accepted.
- All household income documents (such as W-2s, 1099s, Social Security, stocks, interest, gambling winnings, or other income), as well as any IRS letters or other tax documents.
- Business expense documents, including mileage (if filing self-employment).
- If anyone in the household is insured through the WA HealthPlan Marketplace, please bring Form 1095-A.
- Recommended: Bank account and routing number (for direct deposit or direct debit).
- Access to cell phone, computer, and printer (If self-filing or using GetYourRefund).

To maximize your refund we recommend collecting these - they may help you claim credits and deductions on your return:

- All qualified college education expenses (books, course materials, etc.).
- Childcare expenses: name, address, Tax ID or Social Security Number of your child care provider.
- Educator expenses for teachers K-12 (school supplies and materials used in the classroom).

Some Common Deductions Include:

- Charitable donations: list of contributions and amounts, receipts for contributions over \$250.
- Mortgage interest statement (Form 1098) and property taxes paid.
- Out of Pocket Medical Expenses.

Note: This isn't a complete list of documents that may be required or beneficial for your return. These are only some of the most common ones.

