

To file your taxes, you should gather personal information, all income-related forms, and documentation for any deductions or credits you plan to claim.

### Personal and Dependent Information

- **Government-issued photo ID** (e.g., driver's license, passport) for you and your spouse (if filing jointly).
- **Social Security numbers (SSN)** or **Individual Taxpayer Identification Numbers (ITIN)** for everyone listed on your return (you, your spouse, and dependents).
- **Dates of birth** for all individuals listed.
- **Bank account and routing numbers** for direct deposit of your refund or electronic payment of taxes owed.
- **Prior year's tax return** information (specifically your Adjusted Gross Income, or AGI, and e-filing PIN if applicable).
- **IRS Identity Protection (IP) PIN**, if you have one.

**Income Documents:** Gather all forms that report income you received during the tax year.

- **Form W-2** (from employer wages).
- **Form 1099-INT** (interest income from banks).
- **Form 1099-DIV** (dividends and distributions).
- **Form 1099-G** (government payments, such as unemployment benefits or state tax refunds).
- **Form 1099-NEC** or **Form 1099-MISC** (for freelance or independent contractor work, royalties, or other miscellaneous income).
- **Form 1099-R** (retirement plan, pension, or annuity distributions).
- **Form SSA-1099** (Social Security benefits).
- **Form 1099-B** or **Form 1099-S** (income from sales of stock, property, or real estate).
- **Form 1099-K** (payments from payment cards and online marketplaces).
- **Records of digital asset transactions** (cryptocurrency, NFTs).

**Deductions and Credits Documents:** Collect records for expenses that may qualify for deductions or credits, such as:

- **Form 1098** (mortgage interest statement).
- **Real estate and personal property tax records.**
- **Records of charitable donations** (cash and non-cash).
- **Childcare expenses** (including the provider's name, address, and tax ID number).
- **Forms 1098-T** (tuition statements) and **1098-E** (student loan interest) for educational expenses.
- **Form 1095-A** (Health Insurance Marketplace Statement) if you have insurance through the marketplace.
- **Form 5498** (IRA and HSA contributions).
- **Medical expense records** (if you plan to itemize and they exceed a certain threshold).