

Complete your tax document checklist



Whether you use a Tax Pro or file by yourself, many of these documents will be necessary to complete your return and get your biggest refund. Use our checklist tool to see which documents apply to you.

Personal documents

- Your Social Security number or tax ID number
- Your spouse's full name and Social Security number or tax ID number
- Your unexpired government-issued ID
- Your spouse's unexpired government-issued ID

Dependent documents

- Dates of birth and Social Security numbers or other tax ID numbers
- Childcare records (including the provider's tax ID number), if applicable
- Form 8332 when the child's custodial parent is releasing their right to claim a child to the noncustodial parent, if applicable

Income sources

- Tax documents for savings, investments, or dividends
 - Interest and dividend income (Forms 1099-INT, 1099-OID, 1099-DIV)
 - Income from sales of stock or other property (Forms 1099-B, 1099-S, 1099-DA)
 - Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on Form 1099)
 - Expenses related to your investments
 - Record of estimated tax payments made (Form 1040-ES)
 - Forms 1099-B, 1099-K, or 1099-MISC, 1099-DA from crypto/digital/virtual currency, NFTs and all other similar types of income or loss
- Tax documents for childcare expenses

- Daycare paid for a child under age 13 so the taxpayer (and spouse) can work
 - Wages/amounts paid to caregivers
- Tax documents for employed individuals
 - Forms W-2
 - Statements from employer of overtime and tips
- Tax documents for unemployed individuals
 - Unemployment (Form 1099-G)
- Tax documents for self-employed income
 - Forms 1099-NEC and 1099-K
 - Income records to verify amounts not reported on 1099 forms
 - Records of all expenses—check registers or credit card statements, and receipts
 - Business use asset information (cost, date placed in service, etc.) for depreciation
 - Home office information, if applicable
 - Record of estimated tax payments made (Form 1040-ES)
- Tax documents for rental income
 - Records of income and expenses
 - Rental asset information (cost, date placed in service, etc.) for depreciation
 - Record of estimated tax payments made (Form 1040-ES)
- Tax documents for retirement income
 - Pension/IRA/annuity income (Forms 1099-R, CSA1099-R, CSF1099-R)
 - Traditional IRA basis (prior-year Forms 8606 showing amounts already taxed)
 - Social Security/RRB income (Forms SSA-1099, RRB-1099)
- Tax documents for savings, investments, or dividends
 - Interest, dividend income (Forms 1099-INT, 1099-OID, 1099-DIV)
 - Income from sales of stock or other property (Forms 1099-B, 1099-S, 1099-DA)
 - Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on Form 1099)
 - Expenses related to your investments
 - Record of estimated tax payments made (Form 1040-ES)

- Forms 1099-B and/or 1099-DA from crypto/digital/virtual currency, NFTs and all other similar types of income or loss
- Cost of all crypto/digital/virtual currency, NFTs and other similar types of income sales
- Tax documents for other income and losses
 - State refunds (Form 1099-G)
 - Partnership, S-corporation, or trust Schedule K-1s as investor, active owner, or beneficiary
 - Gambling income (Form W-2G or records showing income or expense)
 - Jury duty compensation records
 - Alimony received
 - Hobby income and expenses
 - Prizes and awards
 - Royalties (Form 1099-MISC)
 - Any other 1099 forms received
 - Health Savings Account and long-term care reimbursements (Form 1099-SA or 1099-LTC) deductions
 - Records of real property sales (Form 1099-S)
 - Cancellation of debt (Forms 1099-C, 1099-A)

Deduction sources

- Tax documents for home ownership
 - Form 1098 or other mortgage interest statements
 - Real estate and personal property tax records
- Tax documents for charitable donations
 - Cash amounts donated to religious organizations, schools, and other charitable organizations
 - Records of non-cash charitable donations
 - Miles driven for charitable purposes
- Tax documents for medical expenses
 - Amounts paid for healthcare insurance and payments to doctors, dentists, and hospitals
 - Miles driven for medical purposes
 - Travel expenses for medical treatment, including hotels, planes, tolls, parking, etc.

- Tax documents for health insurance
 - Form 1095-A if you have health insurance through a state Health Insurance Marketplace (Exchange)
- Alimony paid
- Statement from the lender of qualifying vehicle loan interest paid
- Household employee expenses
- Childcare expenses
 - Daycare paid for a child under age 13 so the taxpayer (and spouse) can work
 - Wages paid to a babysitter
- Tax documents for educational expenses
 - Forms 1098-T from educational institutions
 - Receipts for qualified educational expenses
 - Records of scholarships or fellowships
 - Form 1098-E for student loan interest
- Tax documents for state & local taxes and sales tax
 - Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
 - Invoice for large-item purchases such as cars, boats, motorcycles, etc.
 - Amount of real estate taxes paid
 - Amount of personal property taxes paid
- Tax documents for retirement and other savings
 - Form 5498-SA showing HSA contributions
 - Form 5498 showing IRA contributions
 - All other 5498 series forms (e.g., 5498-QA, 5498-ESA)
- Tax documents for federally declared disasters
 - City/county you lived/worked/had property in
 - Records to support property losses (appraisal, clean-up costs, etc.)
 - Records of rebuilding/repair costs
 - Insurance reimbursements/claims to be paid
 - FEMA assistance information