

What to Bring to Do Your Taxes

Grass Roots Taxes
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Personal Info

- Social security/ Tax ID numbers and dates of birth for you, spouse, and dependents
- Photo ID for who is signing the return
- Routing and Account number for your bank if you want direct deposit
- Identity protection PIN if you were a former victim of identity theft (comes in the mail)

Income - Business - Investing

- Form W2 from all employers last year
- SSA-1099 for social security benefits
- Form 1099-R for retirement draws/ pension payments
- Form 1099-misc for payments from people who weren't your employer (gig, self-employed)
- Form 1099-K for credit card payments received (selling on eBay, driving for Uber)
- Forms W2-G from any gambling winnings
- Form 1099-INT for interest received
- Form 1099-DIV for any dividends received
- Brokerage statements from places like Edward Jones or TD Ameritrade
- Form 1099-B for all stock trades.
- Complete buy/sell list from Coinbase or wherever you buy/sell crypto.
- K-1s from any companies you own, family trusts, estates.
- Business and Farm info
- Rent house info (income, insurance, interest, taxes, and repairs)
- Investment info - this includes property flipping, collectibles, etc
- HUD-1 (closing statement) from any properties bought or sold

Deductions - Credits - Other

- 1098 Mortgage interest statement (if you are buying your home)
- 1095A Premium Tax Credit – for ACA health insurance
- K-12 teacher's expenses
- IRA, HSA, SEP contributions
- Education expenses (college and continuing ed and trade schools) and forms 1098-T
- Student Loan interest paid (Form 1098-E)
- Childcare paid – provider's Tax ID, address, and phone number
- Property taxes paid
- Charitable giving – must bring receipts
- Medical expenses paid with after-tax dollars (see it is over 5% of your income, then bring it)
- ANYTHING ELSE YOU THINK MIGHT BE RELEVANT OR USEFUL