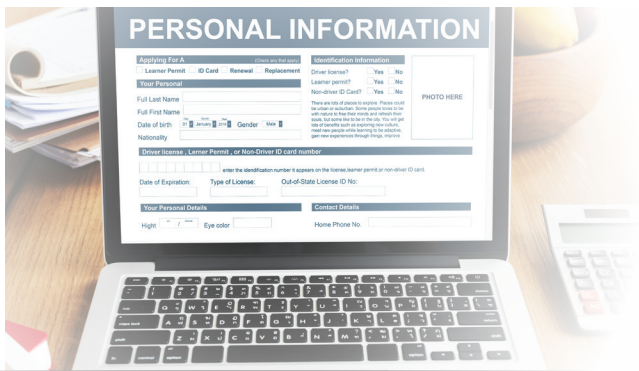


Documents you need to file taxes.

The documents you'll need for tax prep depend on your particular situation. As a rule of thumb, have handy your W-2s, 1099s, receipts, canceled checks, and other documents that support any income, deductions, or credits on your return. Here's a checklist to consider.

Personal Information



- Social Security number or tax ID number
- Spouse's full name, Social Security number or tax ID number, and date of birth
- Identity protection PIN (if the IRS has issued one to you, your spouse, or your dependent)
- Routing and account numbers to receive your refund by direct deposit or to pay your balance due (if you choose)

Dependent(s) information



- Dates of birth and Social Security numbers or tax ID numbers
- Child-care records (including the provider's tax ID number), if applicable
- Income of dependents and other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

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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)

Retirement Income

- Pension, IRA, or annuity income (1099-R)
- Traditional IRA basis (e.g., amounts you contributed to the IRA that were already taxed)
- Social Security or RRB income: SSA-1099, RRB-1099

Savings & Investment Dividends

- Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- Income from sales of stock or other property (1099-B, 1099-5)
- Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)
- Health Savings Account (HSA) and long-term care reimbursements (1099-SA or 1099-LTC)
- Expenses related to your investments
Record of estimated tax payments made (Form 1040-ES)
- Transactions involving cryptocurrency

Employed

- Form W-2

Unemployed

- Unemployment (1099-G)

Self-employed

- Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or 1099-NEC
- Records of all expenses - check registers, 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)

Other Income & Losses

- Payment card and third-party network transactions (1099-K)
- Gambling income (W-2G or records showing income, as well as expense records)
- Jury duty records
- Hobby income and expenses
- Prizes and awards
- Trust income
- Royalty income (1099-MISC)
- Any other 1099s received
- Record of alimony paid or received with ex-spouse's name and SSN
- State tax refund

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Homeownership

- Forms 1098 or other mortgage interest statements
- Real estate and personal property tax records
- Receipts for energy-saving home improvements (e.g., solar panels, solar water heater) All other 1098 series forms

Charitable Donations

- Cash amounts donated to houses of worship, schools, or other charitable organizations
- Records of non-cash charitable donations
- Amounts of miles driven for charitable or medical purposes

Medical Expenses

- Amounts paid for healthcare, insurance
Amounts paid to doctors, dentists, and hospitals
- Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer-provided plan

Health Insurance

- Form 1095-A if you enrolled in an insurance plan through the Marketplace

K-12 Educator Expenses

- Receipts for classroom expenses (for educators in grades K-12)

Child-Care Expenses

- Fees paid to a licensed day-care center or family day-care center for care of an infant or preschooler
- Amounts paid to a babysitter or care provider for your child (under age 13) while you work
- Expenses paid through a dependent care flexible spending account at work

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

Retirement and Other Savings

- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions
- All other 5498 series forms (5498-QA, 5498-ESA)

Federally Declared Disaster

- Proof of city or county you lived, worked, or had property in
- Records to support property losses (appraisal, clean-up costs, etc.)
- Records of rebuilding or repair costs
- Insurance reimbursements or claims to be paid
FEMA assistance information

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