The quality of your tax return and the timeliness of its preparation depend on providing all necessary documents and information. Below is a checklist of commonly required tax documents to help ensure you don't miss anything important.

Important Notes:

- Not all items may apply to your situation; *this list is meant to guide you.*
- Items marked **(REQUIRED)** must be submitted to complete your return.

Personal Information

☐ **License, State ID, or Passport** (REQUIRED)
☐ **Copy of your Social Security Card** (REQUIRED)
☐ **Dependent(s) Social Security Card(s)** (REQUIRED)
☐ Direct Deposit Slip **OR** Bank Statement (for Routing and Account Number)

Income Documents

☐ **W-2** – Wage and Tax Statement (from employer(s))
☐ **W-2G** – Gambling Winnings
☐ **1099-INT** – Interest Income (from bank or financial institution)
☐ **1099-DIV** – Dividend Income
☐ **1099-MISC** – Miscellaneous Income (e.g., self-employment, rental income)
☐ **1099-NEC** – Non-Employee Compensation
☐ **1099-G** – Unemployment Compensation or State Tax Refunds
☐ **1099-K** – Payment Card and Third-Party Network Transactions
☐ **1099-R** – Retirement Plan Distributions or Pensions
☐ **SSA-1099** – Social Security Benefits
☐ Other income documentation (e.g., alimony received, jury duty pay, etc.)

Deductions and Credits

☐ **1098** – Mortgage Interest Statement
☐ **1098-E** – Student Loan Interest Statement
☐ **1098-T** – Tuition Statement (education credits)
☐ Property tax statements (real estate or vehicle taxes paid)
☐ Charitable donation receipts (cash or non-cash contributions)
☐ Childcare provider information (name, address, tax ID, and amount paid)
☐ Medical expenses (if itemizing deductions)
☐ Energy-efficient home improvement receipts (e.g., solar panels, insulation)

Health Insurance

☐ **1095-A** – Health Insurance Marketplace Statement
☐ **1095-B** – Health Coverage
☐ **1095-C** – Employer-Provided Health Insurance

Self-Employment Information

If you are self-employed (small business owner and/or received a 1099), you can potentially reduce your tax liability, even if you didn't pay any taxes during the year.

Please review the checklist below for information you may need to gather for your tax preparer:

General Business Expenses

☐ Advertising
☐ Office Rent
☐ Supplies
☐ Taxes & Licenses
☐ Travel Expenses (flights, hotels)
☐ Meals
☐ Uniforms
☐ Utilities (e.g., internet, phone bill, electricity for office, Zoom subscriptions)

Auto Expenses (for work-related vehicle use)

☐ Make, model, and year of the vehicle
☐ Mileage at the beginning of the year
☐ Mileage when you began using the vehicle for business purposes (if not at the start of the year)
☐ Mileage at the end of the year
☐ Car Insurance
☐ Repairs & Maintenance (e.g., windshield wipers, oil changes, new battery, catalytic converter)
☐ Tires
☐ Gas

Additional Documents

☐ **Prior Year Tax Return** (if new to Monroe Tax Connect)
☐ Records of estimated tax payments made throughout the year
☐ Investment income statements (e.g., stocks, bonds, cryptocurrency)
☐ Rental property income and expenses (e.g., mortgage, repairs, insurance)
☐ Adoption expenses documentation