Tax Document Checklist

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Required Documents

- ❑ Photo ID (driver's license, state photo ID or other government issued identification that includes a photo)
- ❑ Social Security Cards or Individual Taxpayer Identification Number (ITIN) Cards/Letters for each person on the tax return
- ❑ 1095-A, if taxpayer purchased health insurance through Access Health CT
- ❑ Copy of 2024 Tax Year Return
- ❑ Bank account number and routing number for direct deposit

*** *If Married Filing Jointly, spouse **must** be present to sign e-file authorization form*

Income Documents

- ❑ Wages or Salary? (Form W-2) If yes, how many jobs did you have last year?___
- ❑ Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
- ❑ Refund of state/local income taxes? (Form 1099-G)
- ❑ Alimony income or separate maintenance payments?
- ❑ Self-Employment income? (Forms 1099-MISC, 1099-NEC, 1099-K, cash, digital assets, or other property or services) - ***(See Self-Employment Checklist)***
- ❑ Income (or loss) from the sale or exchange of stocks, bonds, digital assets or real estate? (including your home) (Forms 1099-S, 1099-B)
- ❑ Disability income? (such as payments from insurance, or workers comp) (Forms 1099-R, W-2)
- ❑ Retirement income or payments from pensions, annuities, and or IRA? (Form 1099-R)
- ❑ Unemployment Compensation? (Form 1099-G)
- ❑ Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
- ❑ Income (or loss) from rental property?
- ❑ Other income? (gambling, lottery, prizes, awards, jury duty, digital assets, Sch K-1, royalties, foreign income, etc.)

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Adjustments/Deductions

- ❑ Student loan interest payments (1098-E)
- ❑ Educator Expenses for K-12 (receipts)
- ❑ Medical & Dental (including insurance premiums)
- ❑ Mortgage Interest (Form 1098)
- ❑ Taxes Paid (State, Real Estate, Personal Property, Sales)
- ❑ Charitable Contributions
- ❑ Contributions or repayments to a retirement account? (IRA, Roth IRA, 401K, etc.)

Child Care Expenses

- ❑ Child Care Statement from the Provider or the below information
  - Amount Paid to Provider _____
  - Provider's SSN or EIN _____
  - Provider's Name _____
  - Provider's Address _____

Higher Education Expenses

- ❑ Student tuition and book expenses (1098-T, account statement, receipts for books and supplies); total spent in the following categories:

Expenses	**Amount**	
1. Tuition	_____	
2. Fees	_____	Academic fees only
3. Books	_____	Only course required books
4. Supplies	_____	Only course required supplies
5. Room & board	_____	*Not a qualified expense*