Tax Checklist: Gather These Documents for Filing Taxes

You may be mentally prepared to file your taxes, but do you have all the paperwork you need? Round up the following documents before you sit down to do your taxes.

**Personal Information**
- Social Security Number (SSN) or ITIN
- Spouse’s Full name and SSN
- Date of Birth and the SSN for anyone who you will put on your return
- Approximate income of other adults in your home (not spouse, if filing jointly)

**Income Documents**
- 1099-G Form (Unemployment, state tax refund)
- Gambling Income (W-2G or records showing income, as well as expenses)
- Jury duty records
- Hobby income
- Prize or award Income
- Other 1099 Income (1099-R, 1099-DIV, 1099-INT, 1099-G)
- Self-employment income and expenses, including any home office expenses; health insurance premiums paid, transportation or advertising fees
- Rental property documents

**Credit Information**
- Childcare records with the provider’s ID number, if applicable
- Childcare and dependent care expenses
- Expenses for any energy-efficient home improvements
- Tuition or fees paid for education for you, spouse or dependents

**Deduction Information**
- Mortgage statements (Forms 1098 or other)
- Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
- Real estate and personal property tax records
- Vehicle sales tax forms (invoice showing amount paid)
- HUD statement showing closing date home purchase
- Charitable donations records or receipts – cash amounts donated to houses of worship, schools, or charitable donations. Records of non-cash charitable donations
- Amounts paid for healthcare insurance and to doctors, dentists, and hospitals
- Amount of miles driven for charitable, medical purposes or work related
- Expenses related to your investments
- Amount paid for preparation of your 2009 tax return
- Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
- Job-hunting expenses
- Amount paid for preparation of your last year’s taxes, copy of last year’s return
- Moving expenses, if you moved for a job

**Other Information**
- Retirement account rollovers
- Health care reimbursements (1099-SA or 1099-LTC)
- Contributions to retirement plans