

# Essential Documents to Have at the Tax Site

- Government issued photo ID for the taxpayer(s) on the return
- Social Security cards or ITIN documentation for all
- Copy of previous year tax returns
- Income documents for wages, interest, dividends, capital gains/losses, unemployment compensation, pensions and other retirement income, Social Security benefits and self-employment.
- Brokerage statements – sale of stocks or bonds
- Mortgage interest, medical/dental expenses, charitable donations, sales, income or property taxes if you plan to itemize deductions
- Educational expenses – Form 1098-T, student's detailed financial school account, other education expenses
- Healthcare – Forms 1095A if you have Marketplace Insurance
- Checking or savings account info for direct deposit of refund or direct debit of balance due
- Any other recent IRS or state tax department correspondence