

## **Personal Information**

Your personal information tells the IRS and state taxing authority who's filing a return, and deposit your tax refund.

- Your Name
- Date of Birth
- Social Security Number
- Home Address
- Copy of last year's federal and state tax returns
- Bank account number and routing number to receive your refund by direct deposit

## **Dependent Information**

If you can claim someone else as a dependent, you'll need the following information.

- Dependents' name (as it appears on their Social Security card), dates of birth, and Social Security numbers (or tax ID numbers)
- Form 8332 if your dependent child's custodial parent is releasing their right to claim the child as a dependent

## **Sources of Income**

You might receive several different forms documenting the income you received in 2022. Some common ones include:

- W-2s from your employer(s)
- 1099-G forms for unemployment income and state or local tax refunds
- 1099-INT, 1099-DIV, and 1099-B for interest, dividends and stock sales
- 1099-S for income from the sale of your residence or other property
- 1099-MISC for income from a rental property
- 1099-Q for distributions from a health savings account (HSA)
- Schedule K-1 for income from a pass-through business, trust or estate
- Alimony received (if your divorce or separation agreement is dated on or before December 31, 2018)
- Records of any transaction involving cryptocurrency
- Information on other sources of income, such as gambling winnings, jury duty pay, cancellation of debt, etc.

## **Self-Employment and Business Records**

If you're self-employed, you need to report that income. You can also claim business expenses to lower your taxable income.

- Out-of-pocket medical expenses
- Premiums paid for long-term care insurance

- Form 1098 showing any mortgage interest, mortgage insurance premiums, and point you paid during the tax year
- Real estate taxes
- State and local income taxes or sales taxes
- Taxes paid with your vehicle registration
- Charitable donations
- Documentation of casualty losses (if you lived or owned property in a federally declared disaster area)

If you have any of the following deductions, known as adjustments to income, you can claim them even if you don't itemize.

- Form 1098-E for student loan interest
- Records of contributions to HAS, IRA, SEP or self-employed retirement plan
- Alimony paid (for divorce or separation agreements dated on or before December 31, 2018)
- For teachers, expenses paid for classroom supplies
- Premiums paid for self-employed health insurance

### **Tax Credits**

Tax credits are a dollar-for-dollar reduction in the amount of tax you owe. Generally, you'll need the following documentation to claim potentially valuable tax credits.

- Form 1098-T showing expenses for higher education
- Child care costs and care provider's name, address, and tax identification number
- Adoption costs and Social Security number for a child you legally adopted during 2022
- Form 1095-A if you purchase health insurance through the Health Insurance Marketplace

### **Estimated Tax Payments**

If you're self-employed or earn a lot of money that doesn't have federal and state income tax withheld, you may have to make estimated tax payments. Make sure you include those estimates on your tax return, so you don't pay twice.

- Estimated tax payments made during the year to the IRS and state and local tax authorities
- Prior-year refunds applied to the current year
- Any amounts paid with an extension

### **Proof of Losses**

Various types of financial losses can be deductible. Bring documentation of the following losses if they apply to you in 2022.

- Records for any stocks or other investments that became totally worthless or you expect to claim a loss, including date of purchase and original purchase price.
- Records of any non-business bad debts that are not collectible (an example of a non-business bad debt: you lend money to your friend from your personal bank account and they don't repay it)