

Tax Return Checklist

- Proof of identification - Drivers License or other picture ID
- Social Security Cards or copy of SS cards for you, your spouse and dependents and/or a Social Security Number verification letter issued by the Social Security Administration , OR Social Security Benefits Tax Statement WITH SSN (THIS IS REQUIRED FOR YOUR APPT)
- Birth dates for you, your spouse and dependents on the tax return
- Wage and earning statement(s) (Form W-2, W-2G, 1099-R, 1099-G), from all employers
- Self Employment Income (Form 1099-Misc)
- Interest and dividend statements from banks (Forms 1099-INT)
- A copy of last year's federal and state returns *if available*
- Bank routing numbers and account numbers for Direct Deposit
- Total paid for daycare provider and the daycare provider's tax identifying number (SSN or EIN), name and address
- Copy of the settlement statement if claiming the homebuyers credit (these tax returns must be mailed to the IRS)
- College tuition(1098-T, must provide bill/statement/receipt)
- Student loan interest statements (Form 1098-E)
- Mortgage Interest paid(Form 1098)/Property Tax Paid (Bill, receipt, cancelled check)
- Indiana Rent (Amount, Landord Name and Address)
- Record of Additional income received such as: Prizes and awards Scholarships and fellowships Lottery/ gambling winnings
- To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- Any notices received from the IRS or state tax office
- Any other tax documents not mentioned above

If you lost or do not have all of these items, you can still get your taxes prepared. Call the IRS helpline at 1-800-829-1040 to find out what you need to do and how to obtain replacement documents.