

Each year, you are provided with different forms for tax preparation purposes. Most consistently, a form of income representing the amount earned for the year. Other companies are required to give you documentation of your transactions with them, by way of an IRS required form. Depending on your situation, you'll need a variety of documents for tax preparation. Here are some common items to check for that you might need when filing:

- Your Social Security card and number (SSN) or taxpayer identification number (ITIN) and SSNs or ITINs for spouse and dependent or dependents- cards (if any)
- Your birth date and birth date for spouse and dependents (if any)
- Income documents (from every job):
 - W-2 – wages and salary
 - W-2G – gambling winnings
 - Form 1099-R – retirement income
 - Form 1099-INT – interest
 - Form 1099-DIV – dividends
 - Form 1099-MISC – miscellaneous income, including self-employment
 - Form 1099-K - merchant service transactions
 - Form 1099-G – government payments
 - Form 1099-SA – MSA or HSA distributions
 - Form 1099-B – broker or barter exchanges (capital gains/loss)
 - Form SSA-1099 – Social Security benefits
 - Form RRB-1099 – railroad retirement
 - Schedule K-1 – partnership income or loss
- Documents from companies you might have paid during the year:
 - Form 1098 – mortgage interest (bank)
 - Form 1098-E – student loan interest (student loan service provider)
 - Form 1098-T – tuition (accredited college or university)
 - Form 1095 – Health Coverage (there are different versions and you may have more than one- from your job.)
 - Form 1099-C --cancellation debts
- Records and receipts to document:
 - Unreimbursed mileage related to work or volunteering, or church
 - Charitable donations (non-profit organizations)
 - Contributions to retirement plans
 - Healthcare expenses
 - Self-employment income and expenses, including any:
 - Home-office expenses
 - Health-insurance premiums paid
 - Transportation costs
 - Advertising fees
 - Etc. (speak to a tax professional for more details)

- Rental property
- Moving expenses, if you moved for a new job
- Expenses for energy-efficient home improvements
- Tuition or fees paid for education for you, spouse, or dependents
- Retirement account rollovers
- Child care and dependent care expenses, including the employer identification number (EIN) or SSN of the care provider
- A copy of last year's return
- Bank account information to pay any balance due or receive any refund