

Needed to Get Started

- W-2 Earnings or Last Paystub for W-2 Download
- Driver's License(s)
- Social Security Card(s)
- Last Year's Federal and State Tax Returns
- Social Security Numbers and Birth Dates of Dependents

Child/Dependent Residency

**Any one for each dependent*

- School Records or Statement
- Landlord or Property Management Lease/Statement
- Healthcare Provider Statement
- Medical Records
- Childcare Records
- Placement Agency Statement
- Social Service Records or Statement
- Place of Worship Records
- Indian Tribal Official Statement
- Employer Statement

Additional Income Source

- Self-employed Business Income & Expenses (1099-MISC)
- Commissions Paid or Received
- Pension or Retirement Income (1099-R)
- Unemployment Income (1099-G)
- Social Security Income (SSA-1099)
- Alimony Paid or Received
- Lottery or Gambling Winning & Losses

Savings & Investments

- IRA Contributions
- Interest and Dividend Income (1099-INT or 1099-DIV)
- Statements on Stock or Bond Sales (1099-B)
- HSA Contribution
- HSA/MSA Distribution (1099-SA)

Real Estate

- Real Estate Taxes Paid
- Personal Property Taxes Paid
- Mortgage or Home Equity Loan Interest Paid (1098)
- Record of New Home Purchase or Sale
- Rental Income and Expenses
- Repayment of First-Time Homebuyer Credit (5405)

State & Local Taxes

- State or Local Taxes Paid
- State Refund Amount (1099-G)
- Estimated Taxes or Foreign Taxes Paid

Family/Medical

- Affordable Care Act/Marketplace Annual Insurance Premium Statement
- Insurance Reporting on Health Coverage by Employers/Insurers (1095-C/1095-B)
- Medical and Dental Expenses
- Child Care Expenses and Provider Information
- Mileage Records to Doctor Appointments

Work Expenses (Unreimbursed)

- Uniforms, union dues/expenses, dues to professional societies, licenses and regulatory fees, subscriptions to professional journals/trade magazines, tools/supplies used in your work, occupational taxes, passport for a business trip, travel, transportation, meals, entertainment, gifts and local lodging related to your work
- Job-related Educational Expenses

Education Expenses (Unreimbursed)

- College Tuition Statement (1098-T)
- Classroom Expenses for Teachers
- Tuition, books, supplies/equipment needed for a course of study, notebooks, ebooks, education fees, non-academic fees, student activity fees, athletic fees
- Student Loan Interest (1098-E)

Other

- Charitable Donations, cash and non-cash
- Casualty or Theft Losses
- Mileage Records for Travel to and from Goodwill, Salvation Army, Charity Events, Volunteer Work, etc