

Tax Preparation Checklist

- ☐ 1. Proof of identification (state-issued photo ID for each adult, such as valid driver's license or state-issued ID card)
- ☐ 2. Social Security cards for you, your spouse and dependents (not a photocopy)
- ☐ 3. Birthdates for you, your spouse and dependents on the tax return
- ☐ 4. Wage and earning statements (Form W-2, W-2G) from all employers
- ☐ 5. Unemployment compensation statements (1099-G), if applicable
- ☐ 6. Interest and dividend statements from banks (Forms 1099)
- ☐ 7. A copy of last year's federal and state returns, if available
- ☐ 8. Proof of bank account routing and account numbers for direct deposit, such as a blank check
- ☐ 9. To file taxes electronically on a married-filing-joint tax return, both spouses must be present to sign the required forms
- ☐ 10. Total paid for day care and provider's Social Security Number or business Employer Identification Number
- ☐ 11. IRS Letters 6419 (Advanced Child Tax Credit Payments) and 6475 (Economic Impact [stimulus] Payment)