

Items to prepare your taxes

When preparing to get your taxes done, it's helpful to gather the following items:

1. Personal Information:

- Social Security numbers for you, your spouse, and dependents.

2. Income Documents:

- W-2 forms from employers.
- 1099 forms for freelance or contract work.
- Interest and dividend statements from banks or financial institutions.
- Records of any rental income or self-employment income, including profit and loss statements.

3. Deductions and Expenses:

- Receipts for deductible expenses (medical, educational, charitable donations, etc.).
- Form 1098 for mortgage interest.
- Records for student loan interest payments.

4. Health Insurance Information:

- Form 1095-A, 1095-B, or 1095-C to report health coverage.

5. Investment Documents:

- Year-end statements from investment accounts.
- Form 1099-B for the sale of stocks or other assets.

6. Retirement Accounts:

- Contributions to IRAs or other retirement accounts.

7. Other Relevant Information:

- Previous year's tax return, if available.
- Bank account information for direct deposit of refunds.

Gathering these items will streamline the process and ensure you don't miss any important deductions or credits!