Tax Preparation Checklist

This is just a general list of documents that can make the process of filing your taxes easier. You may want to get a folder or other container to put these documents in as you cross them off the list.

**Personal Information**

- Photo ID
- Social Security cards (or ITIN letters of assignment) for you, your spouse, your dependents
- Dates of birth for you, your spouse, your dependents
- Copies of last year’s return for you and your spouse (helpful, but not required, unless using new online software)
- Bank account number(s) and routing number(s) for direct deposit (you can deposit to more than one account, such as both a checking and a savings account)

**Information about your income**

- W-2 forms for you and your spouse
- 1099-G forms for unemployment income
- SSA-1099 for Social Security Benefits received
- Alimony Received
- Miscellaneous income: jury duty, gambling winnings, etc.
- Any other 1099 Forms you may have received

**Health Insurance Documents**

- 1095-A Form if you received your insurance through the Marketplace
- 1095-B or 1095-C if your health coverage was through an employer or other source
- ECN Certificate if you received a health insurance exemption from the Marketplace

**Back-up Information**

- Alimony paid
- Form 1098-E if you made any payments on student loans (or loan statements)
- Form 1098-T if you paid any post-high school tuition (or receipts/cancelled checks)
- Any other 1098 Forms you may have received
- Child care costs: provider’s name, address, Tax ID, amount paid during 2015

**If you itemize your deductions (deductions and credits)**

- Charitable donations: cash amounts, official charity receipts, canceled checks, value of donated property
- Medical and dental expense records
- Miscellaneous deductions: union dues, unreimbursed employee expenses (uniforms, supplies, etc.) Receipts/cancelled checks, other records
- Property Taxes
- Mortgage Interest

For more information on Free Tax Preparation Sites in Whatcom County, please visit:  
www.whatcomabc.org/taxes