Tax Document Checklist

**Required Documents**
- Social Security Cards or Individual Taxpayer Identification Number (ITIN) Cards/Letters **for each person on the tax return**
- Photo I.D. for taxpayer and spouse (if applicable)
- 1095-A, if taxpayer purchased health insurance through Connect for Health Colorado
- If filing jointly, spouse must be present to sign e-file paperwork

**Additional Suggested Items**
- Copy of last year’s return
- Bank account number and routing number for direct deposit

**Income**
- Wages (Form W-2)
- Interest from checking and savings accounts (Form 1099-INT or bank statement)
- Dividend transactions (Form 1099-DIV)
- Unemployment compensation (Form 1099-G)
- Retirement account transactions (Form 1099-R, Form SSA-1099, Form RRB 1099)
- Gambling winnings (Form W2-G)
- Stock transactions with basis reported (Form 1099-B)
- Self-Employment Income
  - 1099-Misc or gross receipts from work
  - Business expenses: supplies, advertisement, etc.
  - Vehicle information (if deducting mileage): year vehicle was placed in service, total business miles, total commuting miles, and total personal miles

**Adjustments/Deductions**
- Student loan interest payments (1098-E)
- Educator Expenses for K-12 (receipts)
- Charitable Contributions

**Child Care Expenses**
- Child care expenses (Provider’s name, address and SSN or Employer Tax ID)

**Higher Education Expenses**
- Student tuition and book expenses (1098-T, account statement, receipts for books and supplies); total in the following categories:

<table>
<thead>
<tr>
<th>Expense</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tuition</td>
<td>______________________________</td>
</tr>
<tr>
<td>2. Fees</td>
<td>______________________________</td>
</tr>
<tr>
<td>3. Books</td>
<td>______________________________</td>
</tr>
<tr>
<td>4. Supplies</td>
<td>______________________________</td>
</tr>
<tr>
<td>5. Room &amp; board</td>
<td>______________________________</td>
</tr>
</tbody>
</table>

Academic fees only
Include only course required books
Include only course required supplies
Not a qualified expense