

# 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:

Expense	Amount	
1. Tuition	_____	
2. Fees	_____	Academic fees only
3. Books	_____	Include only course required books
4. Supplies	_____	Include only course required supplies
5. Room & board	_____	Not a qualified expense