

### **Information you need for the 2022 tax return:**

- Photo identification - taxpayer and spouse
- Social Security Cards or ITIN documents for all members of the household
- Proof of income - W-2 and 1099 Forms, self-employment records, and tips
- Pensions Form 1099-R, Social Security Statement Form 1099-SSA, Sale of stocks & bonds Form 1099-B
- Interest - Form 1099-INT and dividend statements from banks - 1099-DIV, Unemployment Statement (1099-G)
- Other information - mortgage statement, medical expenses, receipts for property taxes, and charitable contributions
- Affordable Care Act healthcare statement - Forms 1095-A
- Total paid to daycare provider and their tax ID number
- Other information - home interest, property taxes, medical expenses, and charitable contributions
- Form 1098-T - tuition payment statement
- Direct deposit information - account number and bank routing number
- A copy of the 2021 tax return
- For married filing joint, both spouses must be present
- Any letter received from IRS or state