

1. Personal Information

- Social Security Numbers (SSNs) or Individual Taxpayer Identification Numbers (ITINs) for yourself, your spouse, and any dependents
- Date of birth for each family member

2. Income Documentation

- **W-2 Forms:** For income from employment
- **1099 Forms:** For various types of income, such as:
 - **1099-INT:** Interest income
 - **1099-DIV:** Dividends and distributions
 - **1099-MISC** or **1099-NEC:** Self-employment or contractor income
 - **1099-G:** Unemployment benefits, state tax refunds
 - **1099-R:** Distributions from retirement accounts
 - **1099-B:** Proceeds from broker and barter exchange transactions
 - **1099-SSA:** Social Security benefits received
- **K-1 Forms:** For income from partnerships, S-corporations, estates, or trusts
- **Alimony** received, if applicable (pre-2019 divorce decrees)

3. Adjustments to Income

- Records for retirement contributions (IRA, 401(k), etc.)
- Health savings account (HSA) contributions (Form 5498-SA)
- Student loan interest paid (Form 1098-E)
- Educator expenses (for teachers)

4. Deductions and Credits

- Mortgage interest statement (Form 1098)
- Property tax receipts
- Medical expenses (if substantial and itemizing deductions)
- Charitable donations receipts
- Childcare expenses, including provider information and amounts paid
- Education expenses (Form 1098-T for tuition, Form 1098-E for student loan interest)
- Adoption costs, if applicable
- Receipts for energy-efficient home improvements

5. Business and Investment Documentation

- Records of self-employment income and expenses (if applicable)
- Rental income and expenses for property you own
- Investment income details and documentation (like brokerage statements)
- Cryptocurrency transactions

6. Other Forms of Documentation

- Prior year's tax return (useful for reference and carryover amounts)
- Bank account and routing numbers for direct deposit or payment
- Estimated tax payments made during the year