



TAXPAYERS CHECKLIST

SS INCOME TAX SERVICE LLC

PERSONAL INFORMATION

- **Social Security Cards for you, your spouse, your dependents**
- **Government issued photo ID (e.g., your driver's license)**
- **Any IRS or State Notices or Letters**
- **Identity Protection Pin (IP PIN), if you have one.**
 - **Copy of 2022 and 2023 tax return (if applicable)**
 - **Bank account and routing number or voided check for direct deposit of funds**
 - **All Forms 1095-B and/or C for employer-sponsored qualifying health care coverage**
- **All Forms 1095-A for the advance payment of the Premium Tax Credit for lower cost health care coverage under healthcare.gov**

DEPENDENT(S) INFORMATION

- **Social Security Cards or Tax ID Numbers**
- **Birth Certificates/ Dates of birth**
- **Childcare records (provider's Tax ID Number)**
- **Form 8332 (showing that the child/children custodial parent surrender their right to claim the child/children, enables noncustodial parent to claim child/children).**
- **Income of dependents**

WAGE AND EARNINGS RECORDS

- **W-2s from your employer(s)**
- **interest income (1099-Int)**
- **Dividend income (1099-Div)**
- **Capital gains (1099-B)**
- **Unemployment (1099-G)**
- **Reports for any cryptocurrency transactions.**
- **Business income and expenses (for sole proprietors) Bank statement, receipts for payments, all payment statements for income received.**
- **Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or 1099-NEC.**
- **Records of all expenses — check registers or credit card statements, and receipts.**
- **Office in home information, if applicable**
- **Record of estimated tax payments made (Form 1040-ES)**
- **Retirement income:**
- **Pension income**
- **IRA distributions**
- **Social security income**
- **Income and expenses for any rental properties**
- **State tax refunds received.**

Other Income & Losses

- **Payment Card and Third-Party Network Transactions - 1099-K**
- **Gambling income (W-2G or records showing income, as well as expense records)**
- **Jury duty records**
- **Hobby income and expenses**
- **Prizes and awards**
- **Trust income**

Other Documents

- **Education costs—forms 1098-T, education expenses**
- **Home mortgage interest and points you paid Forms 1098**
- **Charitable donations—cash amounts and value of donated property, miles driven, and out-of-pocket expenses.**
- **Casualty and theft losses—amount of damage, insurance reimbursements**
- **Home Ownership**
- **Real estate and personal property tax records**
- **Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)**
- **Cash amounts donated to houses of worship, schools, other charitable organizations.**
- **Records of non-cash charitable donations**
- **Medical Expenses**
- **Amounts paid for healthcare, insurance, and to doctors, dentists, and hospitals.**
- **Amounts paid for qualified insurance premiums if paid outside of the Marketplace or an employer provided plan.**

FEDERALLY DECLARED DISASTER

- **City/county you lived/worked/had property in**
- **Records to support property losses (appraisal, clean-up costs, etc.)**
- **Records of rebuilding/repair costs**
- **Insurance reimbursements/claims to be paid.**
- **FEMA assistance information**
- **Check the [FEMA website](#) to see if your county has been declared a federal disaster area.**