

Important Items to Bring to Your Income Tax Appointment

Please Note

Take time to review this list and bring the documents applicable to your tax situation.

General—for all

1. Photo identification
2. Social Security cards for you, spouse and dependents
3. Birthdates for you, spouse, and dependents
4. Last year's federal and state tax returns
5. Bank routing and account number for direct deposit (blank check)
6. Union name and amount paid
7. Evidence of Health Care Coverage
 - a) Form 1095-A – health insurance statement from The Marketplace/Healthcare.gov
 - b) Form 1095-B – health insurance statement from insurer-insurance
 - c) Form 1095-C– health insurance statement from an employer

Documents for income received

1. W-2s from any employers
2. Cancelled Debt/ Form 1099-C
3. Dividends/Form 1099-DIV
4. Gambling/Lottery winnings/Form w-2G
5. Interest/Form 1099-INT
6. Miscellaneous/Form 1099-Misc
7. Pension/retirement/Form 1099-R
8. Self-employment-business income/Form 1099-Misc
9. Social Security income/Form SSA-1099
10. Unemployment/Form 1099-G
11. Alimony received

Documents for items you paid

1. Student loan interest/Form 1098-E
2. Tuition and education expenses/Form 1098-T (PSU Students look on eLion as needed)
3. Unreimbursed educator expenses
4. IRA contributions
5. Alimony paid
6. Daycare provider's information (name, tax ID, amount paid)

Documents Related to Itemizing Deductions on Schedule A

1. Medical/dental expenses
2. Taxes you paid (personal property, other)
3. Interest you paid (e.g. Mortgage/Form 1098)
4. Gifts to charity
5. Miscellaneous deductions (e.g. unreimbursed job expenses-travel, union dues, tax preparation fees, safe deposit box)

If filing status is:

Married filing jointly, both taxpayers must be present to sign the return before we can e-file.

Married filing separately, you need your spouse's Social Security number and name as it appears on the Social Security card.