



Individuals and Families: What to Gather

A general starting checklist for personal and family tax returns.

- ☐ Government-issued photo ID for you and your spouse
- ☐ Social Security numbers (SSN/ITIN) and birth dates for everyone on the return — provide by secure delivery only
- ☐ Prior-year tax return, if available
- ☐ W-2s from all employers
- ☐ SSA-1099 (Social Security benefits)
- ☐ 1099-NEC, 1099-MISC, 1099-K, 1099-R, and 1099-B, plus brokerage and digital-asset statements, where applicable
- ☐ 1099-INT, 1099-DIV, and unemployment (1099-G) statements
- ☐ Records of other income (rental, side income, etc.)
- ☐ Estimated tax payments made during the year
- ☐ Mortgage interest and property tax statements (Form 1098)
- ☐ Childcare provider information, if claiming childcare expenses
- ☐ Form 1098-T, tuition and other education expenses, and student loan interest
- ☐ HSA forms 1099-SA and 5498-SA
- ☐ Charitable-giving records and major medical expenses, if you may itemize
- ☐ Home sale, rental-property, or other major life-change records, where applicable
- ☐ Health insurance marketplace statements (Form 1095-A), if applicable
- ☐ Any IRS or state tax notices received

Please note: This is a general starting list, not tax advice for a specific situation. TaxMart will provide a customized request after learning about your needs. **Do not email Social Security numbers, banking details or tax documents** unless TaxMart has given you approved secure instructions.

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