

What to Bring



Check off the documents that apply to you. Not every item is needed for every return.

1 Identification & basic information

- ☐ Photo ID; Social Security cards or ITIN documents for you, your spouse and dependents
- ☐ Birth dates for everyone on the return; current address and contact information
- ☐ Last year's federal and state returns, if available
- ☐ Current IRS Identity Protection PIN (IP PIN) for anyone issued one
- ☐ Bank routing and account numbers for direct deposit

2 Income documents

- ☐ All W-2s and 1099s, including retirement, Social Security, unemployment and interest
- ☐ Investment sale statements; records of cryptocurrency or other digital asset transactions
- ☐ Self-employment or rental income and expense records, including business mileage
- ☐ Other income records, including cash income, tips and gambling winnings

3 Family, health coverage & education

- ☐ Form 1095-A if you had Marketplace coverage, including Georgia Access
- ☐ Childcare amounts paid, provider name, address and tax identification number
- ☐ Form 1098-T and records of tuition, required books and other education expenses
- ☐ Dependent residency or custody records, if applicable to your situation

4 Other records that may apply

- ☐ Mortgage interest, property taxes, charitable gifts and medical expense records
- ☐ Retirement contribution and Health Savings Account (HSA) records
- ☐ Estimated tax payments and IRS or state tax letters or notices
- ☐ Records of overtime pay, tip income, vehicle loan interest or home energy improvements

Have a question about what to bring? Call or text (478) 743-8299.

Please do not text Social Security numbers, bank details or tax documents.

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General preparation checklist. Additional documents may be needed for your situation.

Reference: IRS Gather Your Documents - irs.gov/filing/gather-your-documents