

TAXPAYERS NEED

(AS APPLICABLE)

Social Security numbers of everyone listed on the tax return.

Bank account and routing numbers for direct deposit or information to make a tax payment.

Forms W-2 from employer(s)

Forms 1099 from banks, issuing agencies and other payers including unemployment compensation, dividends, distributions from a pension, annuity or retirement plan.

Form 1099-K, 1099-MISC, W-2 or other income statement for workers in the gig economy.

Form 1099-INT for interest received.

Other income documents and records of virtual currency transactions.

Form 1095-A, Health Insurance Marketplace Statement.

Information to support claiming other credits or deductions such as receipts for child or dependent care, college expenses or donations.

Profit and Loss Statement and Balance Sheet Statement for the Business