

Make the most of your tax refund

Tax time doesn't have to be stressful. Being organized and prepared can make the process smoother and help you reach your money goals.

Did you bring?

- Photo ID
- Social Security card or verification letter, or Individual Taxpayer Identification Number (ITIN) assignment letter, for all family members
- W-2 forms for all jobs worked in January through December of last year
- Form W-2G and other 1099 forms for other income in January through December of last year
- Form 1099-G for unemployment compensation and state or local tax refunds
- Child care provider name, address, and tax ID number, and amount paid in January through December of last year
- Copy of last year's state and federal tax returns
- Other applicable tax-related documents, such as: interest statements, federal loan documents, retirement statements, list of organizations to which you made charitable donations, etc.
- Forms 1095-A, B or C, Affordable Health Care Statements, or health insurance exemption certificates
- Bank, credit union, or prepaid card account and routing number
- Voided check

Let your tax preparer know if you do not have any of the above items.



Did you know?

Getting free tax help is one step forward in reaching your money goals.

Saving part of your tax refund is another great step. If you receive a tax refund, ask your tax preparer to explain all your saving options.

Information adapted from [irs.gov/individuals/checklist-for-free-tax-return-preparation](https://www.irs.gov/individuals/checklist-for-free-tax-return-preparation).