

Common Tax Documents

Review this list of common tax documents to ensure that you have all the documents you need before starting your tax return. Documents are typically mailed during January or early February. Contact the appropriate company if you have not received your tax forms.

- **Photo ID** for yourself and your spouse if filing a joint return
- **Social Security Card or ITIN letter** for each person listed on the tax return. Visit www.ssa.gov/ssnumber to request a duplicate card
- **Last year's tax returns**
- **For Direct Deposit:** Bank routing number & account number (on a blank check)
- **Amount received in both Stimulus Payments** if you feel you did not receive the proper amount. Bring Notice 1444 & 1444-B (from the White House) or deposit information
- **Any information received from the IRS or NC Dept of Revenue or is reported to the IRS**
- **All documents regarding income received in 2020:** W-2 Forms from employers, 1099 Forms from social security, pensions, IRAs, unemployment, jury duty, contract labor, banks and investment accounts for interest/dividend income
- **Self-employed:** Receipts for expenses and statements of income
- **Child day care or after-school care:** Receipts for amount paid for each child and provider's name, address, phone, and tax ID number
- **College student or parent of a college student:**
 - 1098-T statement
 - Receipts for books and fees, if an undergraduate
 - Statement from your college listing other expenses, if an undergraduate
- **Medical expenses:** Total spent by category (doctors, prescriptions, parking, other) and miles driven. Record of contributions and expenses from Health Savings Accounts
- **Charitable donations:** Total donated in money, value of items donated, & mileage driven for volunteer work
- **Mortgage & Real Estate:** Receipts for interest, points and real estate taxes paid
- **Personal Property Tax:** Receipts for taxes paid on cars or trucks (Vehicle Registration Receipt)
- **Home sold in 2020:** All records of home sales, including closing statements for original purchase and sale of your home
- **Stock sales in 2020:** All records of stock sales, including dates & prices of original purchase (usually reported on 1099-B Form)
- **Alimony paid or received:** Amount & Social Security # of ex-spouse, if divorced before January 2019
- **1095-A form** from the Healthcare Marketplace if you had ACA/Obamacare health insurance during 2020