

What to Bring Checklist, 2019

- 2017 tax return: REQUIRED** if you itemized deductions in 2017 or carry forward a loss **AND** CAD did not prepare your return.
- Valid photo I.D.
- Acceptable verification of social security numbers for all persons listed on the return (SSN card or document issued by Social Security Administration)
- Birth date for all persons listed on the return
- Income statements or forms for 2018:**
 - Wages from each job (Form W-2)
 - Independent contractor (Form 1099-MISC)
 - Unemployment (Form 1099-G)
 - Social Security (Form SSA-1099)
 - Retirement plan distributions (Form 1099-R)
 - Railroad Retirement (Form RRB-1099-R)
 - Gambling winnings (Form W-2G or 1099-MISC)
 - Interest (Form 1099-INT)
 - Dividends (Form 1099-DIV)
 - Brokerage transactions (Form 1099-B)
- Annual benefits statements for MFIP, SSI, MSA, GA, veterans benefits, or workers compensation
- Receipts for education expenses you paid for your dependents in grades K-12, such as tutoring, rental/purchase of instruments, school supplies, computer software or hardware
- Tuition expenses you paid to attend university, college or technical school (Form 1098-T)
- Interest you paid on student loans (Form 1098-E)
- Day care expenses you paid for dependent children (statement with provider's name, address tax ID number, and amount received for each child)
- Letters acknowledging charitable donations of cash or up to \$500 in non-cash items.
- Purchasers of Marketplace health insurance:** APTC documentation (Form 1095-A is **required**). All other taxpayers, bring Form(s) 1095-B or 1095-C.
- Health Savings Accounts** Form 5498-SA or 1099-SA
- Homeowners:** Mortgage interest and real estate taxes paid in **2018** (Form 1098) & Statement of Property Tax payable in **2019**, mailed in March 2019.
- Renters:** Certificate of Rent Paid (CRP) in **2018** from each landlord, mailed by January 31, 2019
- Mobile home owners:** Statement of Property Tax payable in **2019** mailed by the county **AND** Certificate of Rent Paid in **2018** from mobile home park.