

**Important Document:**

- Copy of last year's tax return (if available)

**Personal Information:**

- Social Security numbers (SSNs) for you, your spouse, and dependents
- Date of birth for all family members
- Bank account details for direct deposit of refunds

**Income Documentation:**

- W-2 forms from all employers
- 1099 forms for other income (e.g., self-employment, interest, dividends, rental income)
- K-1 forms for income from partnerships, S-corporations, or estates

**Adjustments to Income:**

- Records of contributions to IRAs or HSAs
- Student loan interest statements (Form 1098-E)
- Moving expenses for military members

**Deductions and Credits:**

- Mortgage interest statements (Form 1098)
- Property tax payments
- Receipts for charitable donations
- Medical expenses and health insurance premiums
- Education expenses (Form 1098-T)

**Dependent Information:**

- Childcare expenses and provider information
- Adoption expenses

**Other Important Documents:**

- Any IRS or state tax correspondence
- Estimated tax payment records