

What I Need to File

Reminder: 2019 taxes are due April 15, 2020 for calendar year filers

You Spouse Dependents

Basic Info

Name, SSN or ITIN, and date of birth

Last Year's Return - hard copy or PDF file (TaxAct can import basic info from PDF's of returns prepared by select software solutions)

Estimated Taxes Paid

You Spouse Dependents

Documents Received

Form W-2s - wage and tax statements

Form 1095s - includes health insurance marketplace statement (1095-A), health coverage (1095-B) and employer-provided health insurance offer and coverage (1095-C)

Form 1098s - includes mortgage interest (1098) and student loan interest (1098-E)

Form 1099s - includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), miscellaneous income (1099-MISC), retirement plan distribution (1099-R), sale of home or real estate (1099-S), capital gain transactions (1099-B), distributions from an HSA, Archer MSA, or Medicare Advantage MSA (1099-SA) and unemployment compensation (1099-G)

Form 2439s - notice to shareholder of undistributed long-term capital gains

Schedule K-1s - partnership, S Corporation and estate or trust income

You Spouse Dependents

Personal Records

Child and Dependent Care Expenses

Education Expenses

Medical Expenses

Vehicle (Personal Property) Taxes Paid

What I Need to File

Reminder: 2019 taxes are due April 15, 2020 for calendar year filers

You Spouse Dependents

 **Personal Records**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Real Estate Taxes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mortgage Interest Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Charitable Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Business or Employee Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gambling Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investment Transactions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Earned Income and Foreign Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Moving Expenses

You Spouse Dependents

 **E-file/Print**

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank Information (Account and Routing Number for Direct Deposit/Withdrawal)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Driver's license



Notes
