



Tax Checklist

Use this list to help you get organized to either file your taxes online or in person.

Note: [If you're getting free help filing your taxes in person](#), make sure you take a photo identification for all adults in your household.

Step 1: Gather your documents

- W-2s** for each job held in 2011 for each person in the household. This form reports your name, wages, and other tax information to the IRS.
- 1099s** and **1098s** showing other income (unemployment, social security, school loans, health care reimbursement, state tax refund, gambling winnings, contract work) that is reported to the IRS.
- Income/interest statements** received for any savings account/investments.
- Bank account numbers:** A voided check or your bank or credit union's routing number and savings or checking account number for your refund to be deposited automatically into your account through direct deposit.
- Last year's tax return** (if you have it)

Step 2: Collect information for everyone in your household

- Name** and **taxpayer number** as they appear on the Social Security Card (SSN) or Individual Taxpayer Identification Number letter (ITIN) for you and all dependents (including children and elderly relatives that you care for)
- Date of Birth** and **Relationship** (son, daughter, mother, etc.)
- Current address** (it may be different from the address on your employment records)



Step 3: [Gather additional items to get a larger refund](#)

- Childcare expenses:** name, address, Tax ID or Social Security Number of the child care provider
- Business expenses and assets:** if you're self-employed or have a small business
- College:** loans and/or scholarships received, and bills for technical/community college or university (Forms 1098-T/1098-E)
- Educator expenses** for teaching grades K-12 (school supplies and materials used in the classroom)
- Charitable donations:** list of contributions and amounts, receipts for contributions over \$250
- Vehicles:** Vehicle sales tax, personal property tax statement for each car you own, total miles driven for the year and/or total miles driven for business
- Renters:** Amount of rent paid
- Homeowners:** mortgage interest statement (Form 1098), real estate taxes paid, Statement of Property Tax Payable in 2011
- Retirement/IRA:** Amount contributed to an IRA and total value as of December 2011
- ITIN:** If you need to apply for an [ITIN](#) for yourself or a family member, [find out what other documents you need to take with you when you get help filing your taxes for free.](#)

Step 4: File your taxes for free through [MyFreeTaxes](#)

Step 5: Keep copies of your forms and tax return

For your protection, keep any forms used to prepare your taxes and a copy of your return for seven years. This information will make it easier to file your taxes next year.

Remember, the deadline to file your taxes is Tuesday, April 17, 2012.