



## All American Best Tax Services LLC

### What you'll need to file your Income Tax Return

Keep the documents and tax forms you need to file your taxes in one place. This way, you can prepare an accurate return, claim deductions or credits and avoid errors that could delay your refund.

#### Personal information

- Social Security number or individual tax ID number (ITIN) for you and anyone else on your return
- Bank account and routing numbers to get a refund or pay by direct deposit
- Your adjusted gross income (AGI) and exact refund amount from your last tax return
- Your name on record with the Social Security Administration (SSA) — notify SSA if you changed your name
- Your current address — notify us if you changed your address
- If you e-filed last year, your self-select PIN
- If you were a victim of identity theft, your IP PIN

#### Income documents

- Paycheck stubs
- Statements from banks, payment apps or online marketplaces
- Checks paid to you
- Records of digital asset transactions
- Unemployment compensation

#### Forms W-2, 1099 or other information returns

People or organizations that paid you during the year are required to report the payments to the IRS on an information return. They must file these forms with the IRS



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and send a copy to you. You should get them electronically or by mail in January or February.

These forms report income you received during the year:

- Forms W-2 or a corrected W-2 show your wages from employers. Here's what to do if you didn't get a W-2.
- Form W-2G for lottery and gambling winnings

Forms 1099 show other types of income. The most common are:

- Form 1099-K for payments from payment cards and online marketplaces
- Form 1099-G for government payments such as unemployment benefits
- Form 1099-INT from banks and brokers showing interest you received
- Form 1099-DIV for dividends and distributions paid to you
- Form 1099-NEC for freelance and independent contractor work in the gig economy
- Form 1099-R for retirement plan distributions or pensions or annuities
- Form SSA-1099 for Social Security benefits
- Form 1099-MISC for other miscellaneous income
- Form 1095-A, Health Insurance Marketplace Statement, lets you reconcile advance payments or claims

### Documents for credits or deductions

- Childcare or dependent care expenses
- Home mortgage and property tax records
- Donations to charity
- Health savings account or flexible spending account contributions
- Healthcare expenses
- Retirement contributions



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- If you're a student or teacher, receipts for books, tuition and other education expenses

### Documents from side jobs and self-employment

- Statements from banks, payment apps, card processors or online marketplaces
- Checks paid to you
- Receipts and mileage logs for travel, gift and car expenses
- Records of deductible office expenses
- Estimated tax payments
- Other business income and expense records

The intent of this document is to provide you with a check list in prep for your tax filing!  
Hope this is helpful!

Thanks!