



## TAX TIME CHECKLIST

# Make the most of your tax refund

Tax time doesn't have to be stressful. Being organized and prepared can make the process smoother and help you reach your money goals.

## What to bring

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### 1 Tax documents

Avoid multiple trips by bringing your important papers and information when you meet with your tax preparer.

- Photo ID
  - Social Security card or verification letter, or Individual Taxpayer Identification Number (ITIN) assignment letter, for all family members
  - W-2 forms for all jobs worked
  - Form 1099-G for unemployment compensation and state or local tax refunds
  - Form W-2G and other 1099 forms for other income
  - Child care provider name, address, and tax ID number, and amount paid
  - Copy of last year's state and federal tax returns
  - Other applicable tax-related documents, such as: interest statements, federal loan documents, retirement statements, list of organizations to which you made charitable donations, etc.
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### 2 Health insurance documents

- A list of the people on your tax return with health insurance coverage and which months they were covered
  - Form 1095-A, which was mailed to you if you or anyone on your tax return had coverage through the national or state health insurance marketplace
  - Form 1095-B or 1095-C, which was mailed to you if you had coverage from another source (not everyone with insurance will receive these forms this year)
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### 3 Account information

Bring your bank or credit union account information so you can easily deposit your refund and use some of your refund for savings.

- Banking or credit union account information
- Voided check or savings deposit slip



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## MAKE THE MOST OF YOUR TAX REFUND

### Additional information

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You may need to bring more documents, depending on your situation. If you have questions about what to bring, contact your local tax preparation office. If you are married and filing jointly, you and your spouse should go together, because both of you must sign the tax return.

### Did you know?

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Getting free tax help is one step forward in reaching your money goals. Saving part of your tax refund is another great step. You can directly deposit part of your refund into savings or purchase a savings bond, which earns interest and adjusts with inflation.

If you receive a tax refund, ask your tax preparer to explain all the ways you can start saving.

Information adapted from [www.irs.gov/Individuals/Checklist-for-Free-Tax-Return-Preparation](https://www.irs.gov/Individuals/Checklist-for-Free-Tax-Return-Preparation).