

# Document Checklist: for 2023 Tax Year

(Use for reference, not a complete list)



Category	✓	Document Required	Explanation
Identification	<input type="checkbox"/>	Photo ID	Required for you and your spouse if filing jointly
	<input type="checkbox"/>	Social Security Cards or ITIN letters	A card or letter is required for every member of your family appearing on the tax return
	<input type="checkbox"/>	Spouse (Social Security Card, DOB)	Required if you are married filing separately
	<input type="checkbox"/>	Identity Protection Pin	If the IRS issued you an Identity Protection PIN the # is on a letter sent you by the IRS in January 2024
Income Documents	<input type="checkbox"/>	W-2, 1099-NEC or 1099-MISC	From ALL jobs worked in 2023
	<input type="checkbox"/>	W2-G	If you received any gambling income (over \$1200)
	<input type="checkbox"/>	SSA-1099	If you received Social Security Income
	<input type="checkbox"/>	1099-G	If received unemployment benefits
	<input type="checkbox"/>	1099-INT or 1099-DIV	If you received income from interest or dividends
	<input type="checkbox"/>	1099-R	If you have retirement Income
	<input type="checkbox"/>	1099-C	If you had any cancelled debt
	<input type="checkbox"/>	1099-K	If you received payments for goods or services that exceed \$600 from a payment card or third-party network. (i.e. Venmo, PayPal, Uber etc.)
	<input type="checkbox"/>	Business income records	If self employed
Tax Credits	<input type="checkbox"/>	Provider SSN#/EIN#, name & address	If you have childcare or dependent care costs
Tax Deduction and Expenses	<input type="checkbox"/>	Medical expenses	If total exceeds 7.5 % of AGI
	<input type="checkbox"/>	Job related business expenses	If self-employed
	<input type="checkbox"/>	1098 Mortgage statement	If you have home mortgage interest
	<input type="checkbox"/>	Records of charitable contributions	If any contributions were made in 2023
	<input type="checkbox"/>	1098E or 1098T	If you have a Student Loan or Tuition Statement
	<input type="checkbox"/>	Educational expenses	If student
	<input type="checkbox"/>	IRA contributions	Any contributions not on W2
	<input type="checkbox"/>	Property tax payment records	If you paid any taxes for property (i.e. car, property)
Other	<input type="checkbox"/>	1095-A	If received health insurance from the Marketplace (Access Health CT)
	<input type="checkbox"/>	Last year's tax return	If available
	<input type="checkbox"/>	Bank Routing and Account Number	If you wish Direct Deposit