

# TAX FILING

## *checklist - HEAD OF HOUSEHOLD*

***Unmarried taxpayers who paid more than half the cost of keeping up a home for a qualifying person.***

### **PERSONAL INFORMATION**

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- GOVERNMENT ISSUED PHOTO ID
- SOCIAL SECURITY CARD OR ITIN
- BANK ACCOUNT INFO (DIRECT DEPOSIT)

### **INCOME DOCUMENTS**

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- W-2(S)
- 1099-NEC OR 1099-MISC (IF SELF-EMPLOYED OR GIG WORK)
- 1099-INT / 1099-DIV (INTEREST OR DIVIDENDS)
- 1099-R (RETIREMENT DISTRIBUTIONS, IF APPLICABLE)
- OTHER INCOME RECORDS (UNEMPLOYMENT, PRIZES, ETC.)

### **DEDUCTIONS & CREDITS**

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- MORTGAGE INTEREST (FORM 1098)
- PROPERTY TAX STATEMENTS
- RETIREMENT CONTRIBUTIONS
- CHARITABLE DONATIONS
- HEALTH INSURANCE COVERAGE (IF APPLICABLE)

### **DEPENDENTS**

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- CHILDCARE PROVIDER INFORMATION
- EDUCATION RECORDS
- PROOF OF RESIDENCY

### **OTHER DOCUMENTS**

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- PRIOR YEAR TAX RETURN
- IRS LETTERS OR NOTICES (IF ANY)