

TAX FILING

checklist - **QUALIFYING SURVIVING SPOUSE**

Widowed taxpayers with dependents, within the allowed timeframe.

PERSONAL INFORMATION

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

INCOME DOCUMENTS

- 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

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

DEPENDENTS

- CHILDCARE PROVIDER INFORMATION
- EDUCATION RECORDS
- PROOF OF RESIDENCY

OTHER DOCUMENTS

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