

# TAX FILING

## *checklist -* **MARRIED FILING JOINTLY**

***Married couples filing one joint tax return.***

### **PERSONAL INFORMATION - BOTH SPOUSES**

---

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

### **INCOME DOCUMENTS - BOTH SPOUSES**

---

- 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 (IF APPLICABLE)**

---

- CHILDCARE PROVIDER INFORMATION
- EDUCATION RECORDS
- PROOF OF RESIDENCY

### **OTHER DOCUMENTS**

---

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